MGC
Personal Scheduler

Quick Start Guide

Version 9.0

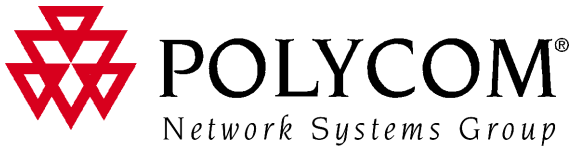

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Table of Contents

Introduction 1-1

Package Contents 1-2

System Requirements 1-3

Prerequisites 1-4

About the MGC Personal Scheduler User's Guide 1-4

Installation and Configuration 2-1

MGC Personal Scheduler Software Installation 2-2

Deploying the Client Application 2-2

SQL Database Configuration 2-5

MGC Web Server Manager Configuration 2-8

Connecting the MGC Web Server Manager 2-9

Adding a New MCU 2-10

Connecting an MCU 2-13

Personal Scheduler Visual Customization 2-14

Customization From the MGC Personal Scheduler Configuration Window 2-14

MGC Personal Scheduler Parameter Configuration 2-17

Customization from the Microsoft Outlook Editor 2-24

Setting a Password 2-30

Managing Templates 2-32

Managing Conferences 3-1

Scheduling Conferences 3-2

Scheduling the Reservation Directly From the Calendar 3-6

E-mail Signature 3-10

MGC Manager Reservation Remarks 3-12

Modifying Appointments and Meetings 3-15

Canceling Appointments and Meetings 3-15

Scheduling Recurring Appointments and Meetings 3-16

Modifying Recurring Appointments or Meetings 3-18

Canceling Recurring Appointments and Meetings 3-19

Canceling Recurring Appointments/Meetings 3-19

Application Exception 3-20
Viewing the Report 3-21
Appendix A: Default Templates A-1
Default Conference Template Properties - Default_COP A-2
Default Conference Template Properties - Default_Video A-6
Default Conference Template Properties - Default-Audio A-9
Default Conference Template Properties - Software CP A-12
Default Conference Template Properties - Video-Switch A-16

1

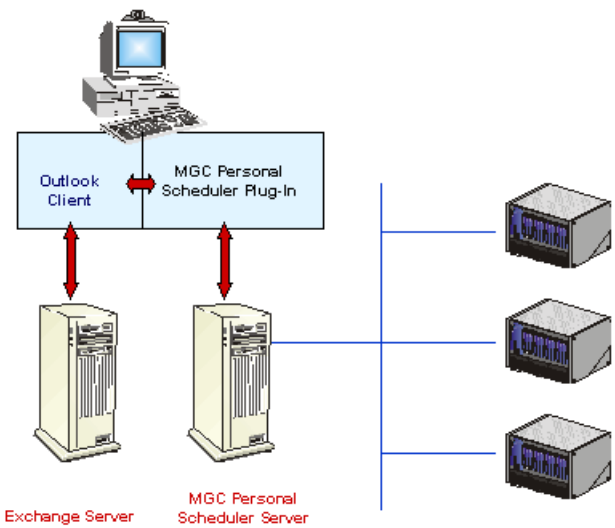
Introduction

Polycom MGC Personal Scheduler is designed for scheduling audio and video conferences on the MCU directly from the Microsoft Outlook® application.

Using the standard Microsoft Outlook conventions, the user schedules the conference start date and time, conference duration, and invites other participants from their Microsoft Outlook Calendar.

MGC Personal Scheduler is a plug-in to the users' Outlook Client application. The plug-in communicates with the MGC Personal Scheduler Server (MGC Web Server Manager), which reserves the conference on an MGC unit.

For more details on using the MGC Personal Scheduler with the MGC WebCommander application, refer to the *MGC WebCommander Web Server Manager - Installation and Configuration Guide, Version 9.0.*



The MGC Personal Scheduler is configured by an Administrator who e-mails the Personal Scheduler application to end-users or use the automatic Client installation. The installation of the client software is automatic - allowing Personal Scheduler to seamlessly interface with the end-users' Microsoft Outlook application.

Once the user schedules the conference in Microsoft Outlook, it is submitted to the Personal Scheduler Server for MCU resource availability. An accept/reject notification box opens, notifying the conference organizer if the conference has been successfully reserved on the MCU. The conference is rejected by the MCU when resources are insufficient to run the conference at the requested date and time (or dates and times if a recurring conference). If the conference is accepted, a signature is added to the conference e-mail, including various conference parameters required to start the conference, such as the conference name (for IP and ISDN conferences), password (if applicable), and the dial-in number (for IP and ISDN conferences). Users can modify the conference date, time, duration and add/delete participants using the standard Microsoft Outlook conventions.

Users who have Polycom WebCommander can monitor conferences reserved via Personal Scheduler on the WebCommander Web site. For users who have Polycom WebOffice, Personal Scheduler enables a WebOffice user's to schedule a meeting/conference.

Package Contents

The MGC Personal Scheduler package includes:

- MGC Web Server Manager
- MGC Personal Scheduler Client application installation utility
- Databases
- Conference Templates
- Documentation
  - — MGC Personal Scheduler Quick Start Guide (PDF)

System Requirements

This section lists the MGC Personal Scheduler requirements. There are different requirements for the computer running the MGC Web Server Manager and for the computer running the MGC Personal Scheduler for the Client.

Personal Scheduler MGC Web Server Manager requirements:

- PC with Pentium III, 400MHz (or higher) processor
- 256 MB RAM
- Windows® NT/2000/XP and Microsoft Vista operating systems
- Free hard disk space:
  - For MGC Web Server Manager application: 150 MB
  - For Database records: 30 MB
  - If SQL server is installed: 200 MB
- Database Software:
  - With the WebCommander and MGC Personal Scheduler it is recommended to use Microsoft SQL Server database. Microsoft Access can be used for the MGC Manager application
  - When integrating the Polycom PathNavigator database, use the Microsoft SQL Server version 7.0, SQL 2000 or SQL 2005 application. In this case, Windows NT Service Pack 4.0 or later is required

If Personal Scheduler is installed as part of the Polycom WebCommander package, the WebCommander server requirements must also be met. For more information, see the MGC Web Server Manager Installation and Configuration Guide.

Personal Scheduler Client requirements:

- PC with Pentium 166 MHz or higher processor
- 64 MB RAM
- Windows® 95/98/ME/NT/2000/XP operating system

- Microsoft Outlook® 2000 and above

The MGC Personal Scheduler plug-in can also be used with Microsoft IE7.

Prerequisites

This manual assumes the user has the following knowledge:

- Familiarity with the Windows environment
- Familiarity with Microsoft Outlook®
- Basic knowledge of video conferencing concepts and terminology

About the MGC Personal Scheduler User's Guide

The Personal Scheduler User's Guide includes the following topics:

- **Chapter 1 - Introduction**
  Provides a general description of Personal Scheduler, System Requirements and Prerequisites.
- **Chapter 2 - Installation and Configuration**
  Includes information the Administrator needs to install and configure the MGC Web Server Manager, SQL Database and Conference Templates. It also describes how to deploy the application to end-users.
- **Chapter 3 - Managing Conferences**
  Describes how the end-user sets up conferences using Personal Scheduler, including modifying and cancelling meetings and recurrent meetings.

2

Installation and Configuration

After the Administrator installs the MGC Personal Scheduler package, he/she configures the Client software for deployment for end-user installation. Personal Scheduler is configured solely by the Administrator; there is no configuration required on the part of the end-user.

After Personal Scheduler is configured, the Administrator sends the Personal Scheduler Client application by e-mail or can use the automatic Client installation. The Personal Scheduler client is automatically installed when the end-user runs (double-clicks) the attachment. For more information, see “MGC Personal Scheduler Software Installation” on page 2-2.

Administrator installation and configuration of Personal Scheduler includes:

- Personal Scheduler Software Installation
- SQL Database Configuration (if an SQL Database is used)
- MGC Web Server Manager Configuration
  - Connecting to the Server
  - Adding MCUs
  - Connecting MCUs
  - Personal Scheduler Configuration
- Template Management
- Client Application Administrator Installation (optional)
- Client Application Deployment

MGC Personal Scheduler Software Installation

The Administrator has the option to automatically deploy the Personal Scheduler Client by installing the Client automatically or enable user to manually install the Client on the hard disk. The Administrator of MGC Personal Scheduler Client can enable the user to install the Client in one of two ways:

- Attach the **ClientInstall** Version 9.0 folder in an E-mail enabling the user to save the folder to disk. The user then installs MGC Personal Scheduler by double clicking setup.exe icon in the folder. For further information, “Deploying the Client Application” on page 2-2.
- Alternatively, send the link of a folder located on the network in an E-mail. To install Personal Scheduler, the user double-click’s the setup.exe icon.
  When the MGC Personal Scheduler is configured by the administrator, the Client application is deployed on the network by sending out an e-mail with an shortcut as an attachment. Users open this self-extracting file which automatically installs the MGC Personal Scheduler on their computer. The Installation Wizard guides you through the installation process of the Personal Scheduler software.

In version 8.0 the Visual Configuration file is automatically backed up. This allows you to re-install the MGC Personal Scheduler without losing your configurations. It is recommended to close Microsoft Outlook during the Client installation. The MGCScheduler.oft file is automatically backed up in the CustomizeMGCSchedule.oft file located in the ClientInstall folder. If Personal Scheduler is installed as part of the Polycom WebCommander package, the WebCommander server requirements must also be met. For more information, see the MGC Web Server Manager Installation and Configuration Guide.

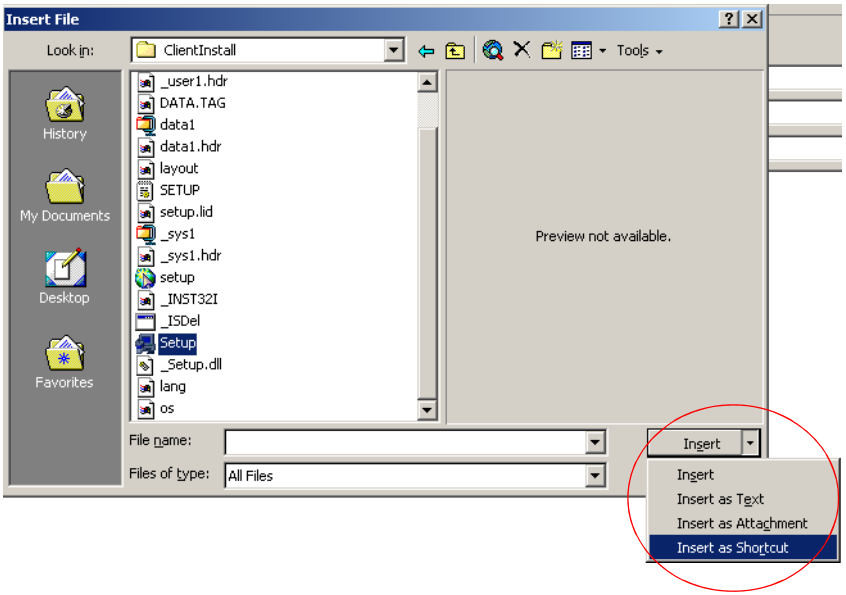
Deploying the Client Application

After Personal Scheduler is configured by the Administrator, the Client application is deployed by sending out an e-mail with an attached shortcut. End-users open this self-extracting file which automatically installs Personal Scheduler on their computers.

To e-mail the Client application shortcut:

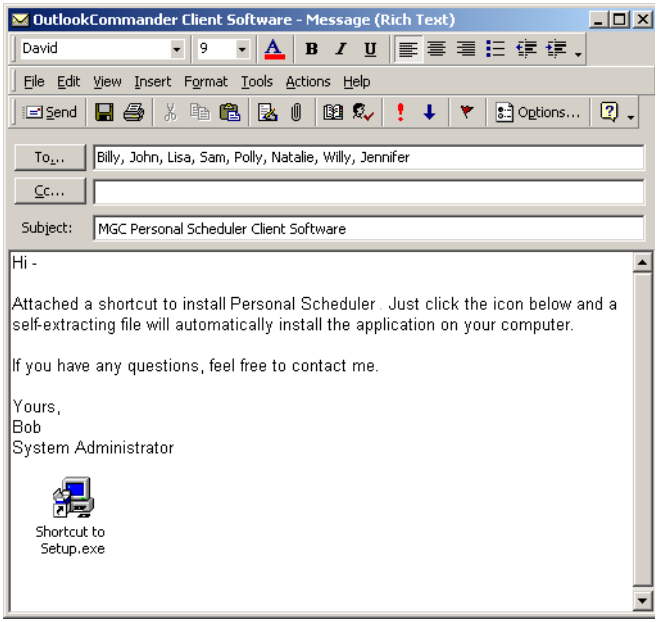
1. Create a new e-mail message.
   The *New E-mail Message* window opens.

2. On the *Insert* menu, click **File**, or click the *Attach File* icon. The *Insert File* dialog box opens.
3. Browse to the directory where the Client **Setup** file is located. By default this file is located at: **C:\Program Files\MGC Personal Scheduler 8.0\Personal Scheduler\ClientInstall**.
4. Click the **Setup** file.
5. Click the *Insert* button arrow, and then click the **Insert as Shortcut** option button in the list.



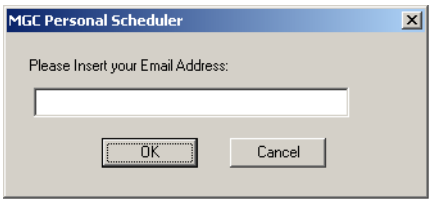
The link appears in the e-mail message as a shortcut.

6. Send the e-mail to end-users for installation.



7. Once the e-mail is received by the end-user, he/she should double-click the shortcut to start the self-extracting installation of Personal Scheduler.

8. In rare instances when the MGC Personal Scheduler cannot recognize the Clients e-mail address, the following dialog box opens, asking the user to enter their e-mail address. This dialog box only appears once, the first time the Client installation is installed.



The folder where the Setup file is located must be shared or the end-user cannot access the installation shortcut.

SQL Database Configuration

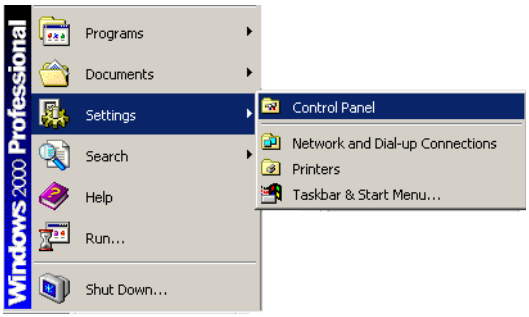
The database enables access to various database tables, such as the MCUs Users and Groups lists.

Personal Scheduler includes two default databases: Access database and SQL database. If you are using the Access database, you do not have to define any additional properties. If you are using the SQL database, you must define the MGC Web Server user properties.

When more than one application needs to be connected to the database, such as the MGC Manager, Personal Scheduler and PathNavigator, it is recommended to use the SQL database. It is also recommended to use the SQL database when the number of users in the install base is more than 100.

To define the MGC Web Sever Manager user properties for the SQL database:

1. On the *Start-Settings* menu, click **Control Panel**.



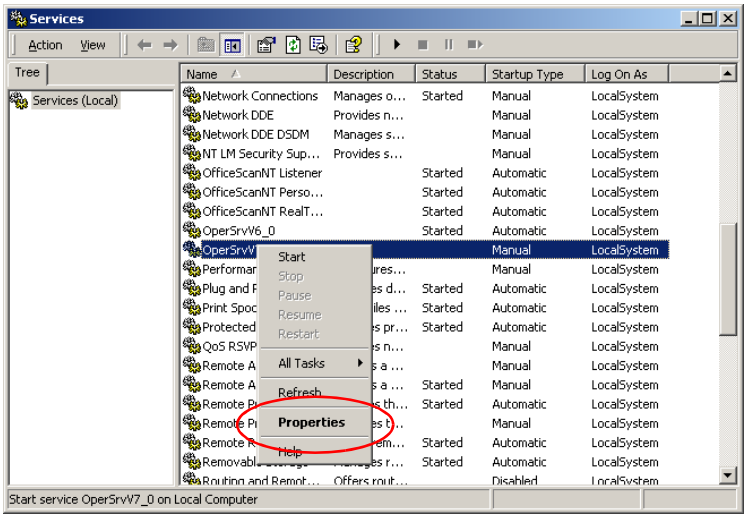
   The *Control Panel* window open.

2. Double-click the *Administrative Tools* icon.

   The *Administrative Tools* window opens.

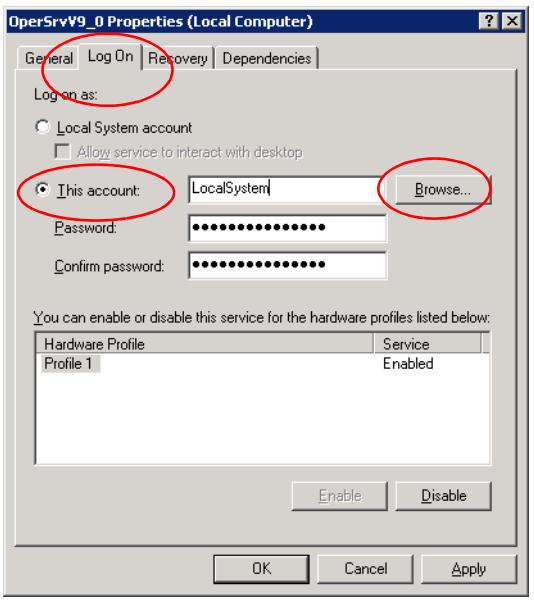
3. Double click the *Services* icon.

The *Services* window opens.



4. Right-click **OperSrvV9_0**, and then click **Properties**.

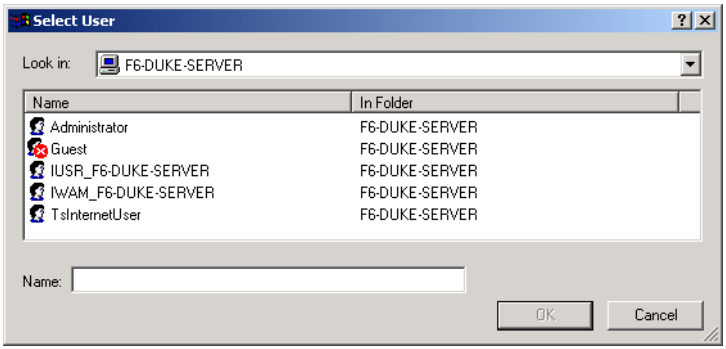
   The *OperSrvV9_0 Properties* dialog box opens.



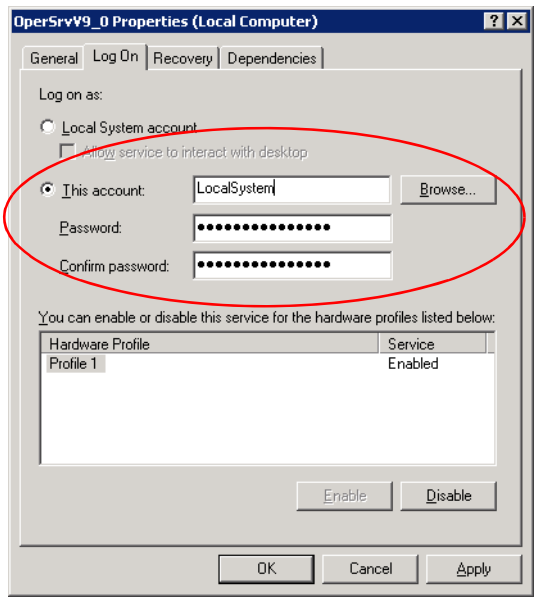
5. Click the **Log On** tab.

6. Select **This account** and then click the **Browse** button to select the user.

   The *Select User* dialog box opens, displaying the name of the selected user.



7. Select the user name from the list, and click **OK**.
   The *OperSrvV9_0 Properties - Log On* dialog box reappears.



8. In the *Password* field, enter the user's password.
9. In the *Confirm Password* field, enter the user's password again.
10. Click **OK** to confirm and complete the procedure.

MGC Web Server Manager Configuration

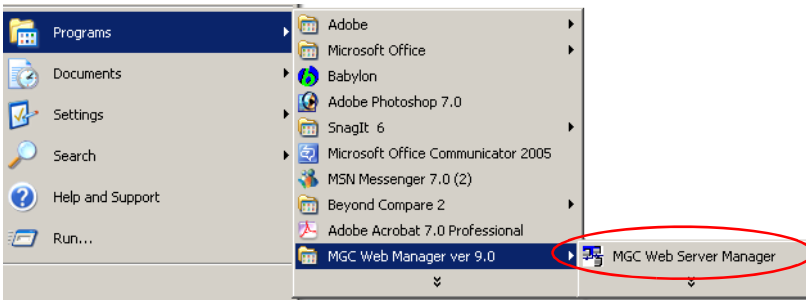
The MGC Web Server Manager application is the user interface for configuration of Personal Scheduler. It allows the Personal Scheduler Server to communicate via the MGC Web Server with the MCUs.

Configuration of the MGC Web Server Manager includes:

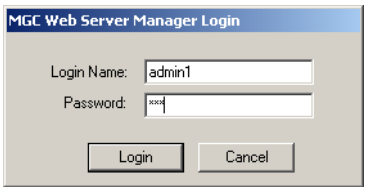
- Connecting to the Server
- Adding MCUs
- Connecting the MCUs
- Configuring Personal Scheduler

To start the MCU Web Server Manager application:

1. On the *Start - Programs* menu, click **MGC Web Manager 9.0**, and then click **MGC Web Server Manager**.



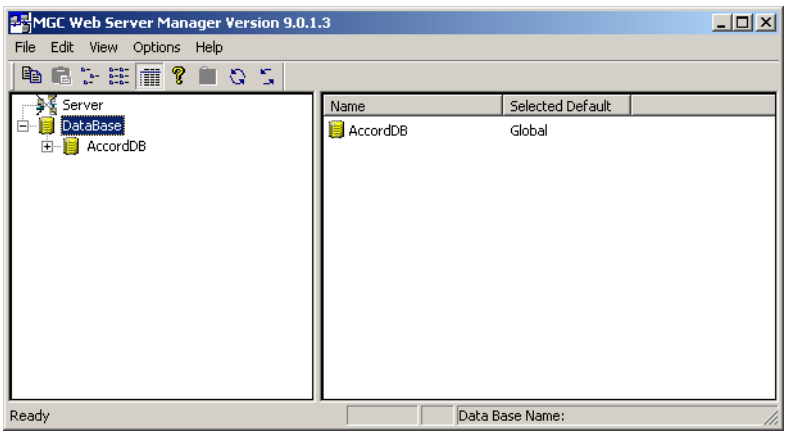
The *MGC Web Server Manager Login* dialog box opens.



2. Enter the *Login Name* and *Password*, and click **Login**.

The default Login Name is **admin1**. The default Password is **123**.

The *MGC Web Server Manager* window opens.

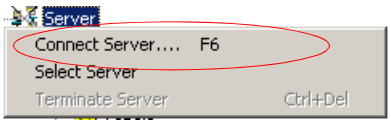


Connecting the MGC Web Server Manager

The MGC Web Server Manager application is the link between the MCU and the Personal Scheduler Server. The MGC Web Server Manager must first connect to the Personal Scheduler Server before the connection to the MCU may be initiated.

To connect the MGC Web Server Manager:

- Right-click on the *Server* icon and then click **Connect Server**.



When MGC Web Server Manager application is connected the X is removed from the Server icon and a blinking green LED indicates that the Server is active.

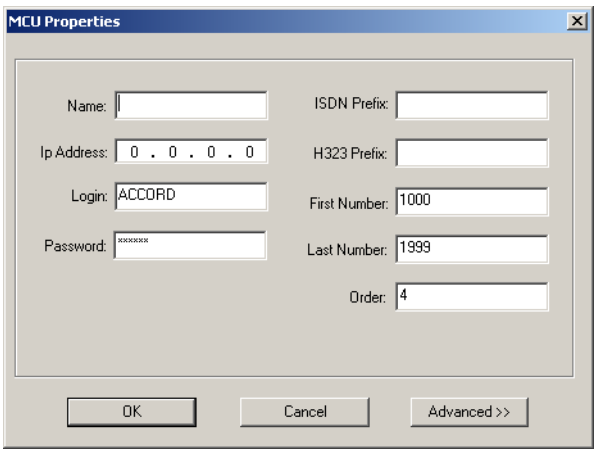
Adding a New MCU

Conferences are reserved on an MCU. At least one MCU must be defined in the MGC Web Server database.

To add an MCU:

1. Click the **[+]** icon next to **Database** to expand the list.
2. Click the **[+]** icon next to **<Database name>** to expand the list.
3. Right-click on the *MCUs* icon, and then click **Add New MCU to DB**.

The *MCU Properties* dialog box opens.



4. Fill in the fields as described in Table 2-1.

Table 2-1: MCU Properties Fields

Field	Description
Name	The name of the MCU. Specify a name that clearly identifies the MCU.
IP Address	The IP Address of the MCU. This should be the IP address of the MCU LAN control port (and not the IP of the H.323 card).

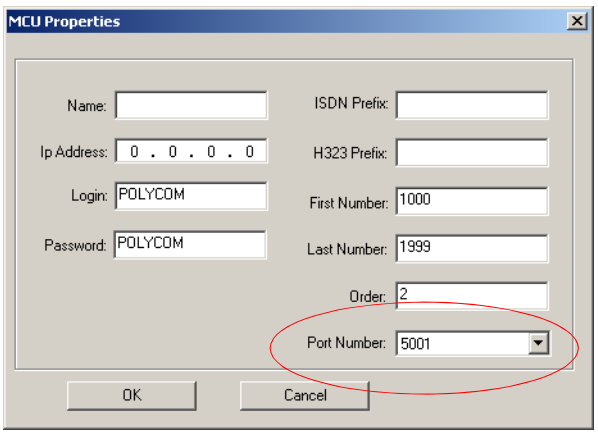
Table 2-1: MCU Properties Fields (Continued)

Field	Description
Login	The login name used when connecting to the MCU.
Password	The password used when connecting to the MCU.
ISDN Prefix	The first digits of the MCU number that are added at the beginning of the dial-in number allocated by the MCU. The full dial-in number is allocated by the service provider that supplies the phone line - as the call passes through the PBX, the MCU truncates part of the full number. This number is configured in the MGC Manager application. For details on this prefix, ask your System Administrator or MCG Manager operators.
H.323 Prefix	The MCU prefix that is added to the conference name. This number appears in the conference e-mail signature that is sent to conference participants. This prefix must be the same number that is defined in the Gatekeeper - the number is defined in the MGC Manager in the *Network Services Properties* dialog box, *Gatekeeper* tab.
First Number	The first phone number in the range of dial-in numbers that can be allocated by the MCU. These numbers are added to the Prefix number to compose the complete number dialed by participants when connecting to the MCU. For example if you enter 1000, and the prefix is 97865, the first dial in number in the range is 978651000.
Last Number	The last phone number in the range of dial-in numbers that can be allocated by the MCU. These numbers are added to the Prefix number to compose the complete number dialed by participants when connecting to the MCU. For example if you enter 9999, and the prefix is 97865, the last dial in number in the range is 978659999.

Table 2-1: MCU Properties Fields (Continued)

Field	Description
Order	The order in which the MCUs are selected to handle a new conference when two or more MCUs are connected. When a new conference is started, the system tries to establish it on the MCU numbered as 1. For more information, see the MGC Web Server Manager User's Guide. If Personal Scheduler is installed as part of the Polycom WebCommander package, the WebCommander server requirements must also be met.

5. In order to work with firewalls, the MCU listening port can be selected. The default listening port is 5001. The Internet Assigned Numbers Authority (IANA) assigned a new port number (1205) to the MGC Unit (Polycom MCU). If you have problems connecting to the MCU with port 5001, click the **Advanced** button to select the new port number.
6. In the *Port Number* list, select **1205**.



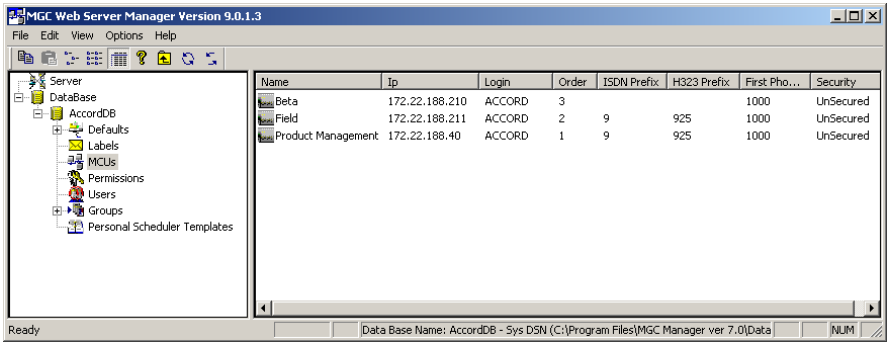
7. Click **OK** to confirm and add the MCU to the MCUs list.

Connecting an MCU

After you have connected to the MGC Web Server Manager and added at least one MCU, you can now connect the MCU.

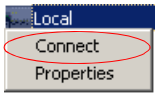
To connect to an MCU:

1. Click the *Server* icon to display the list of MCUs currently defined in the MGC Web Server Manager.



   The MCUs list contains all of the MCUs currently defined in all databases set in the MGC Web Server Manager application. If the same MCU is defined in two databases, it will appear twice in the MCU list.

2. Right-click the *MCU* icon, and then click **Connect**.



   The system connects to the selected MCU. The MCU status that appears in the *Status* area changes first to *Connecting* during the connection procedure, and then to the current connection status at the end of the connection procedure.

For details on the MCU statuses, refer to the *MGC Manager User's Guide*.

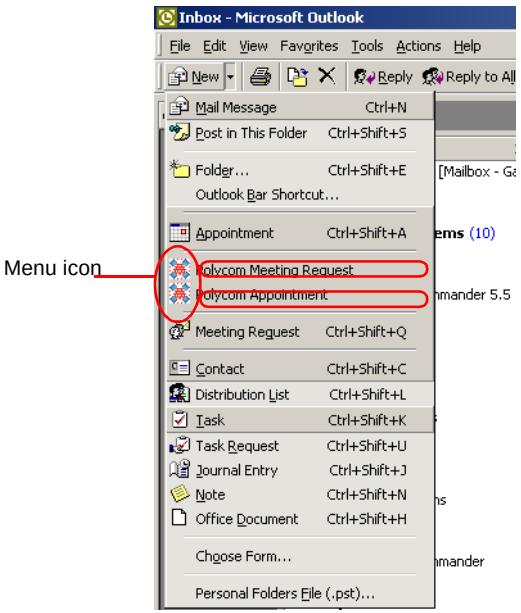
Personal Scheduler Visual Customization

The administrator can specify the text, icons and images, and configure the Tab fields and properties in the client's Personal Scheduler.

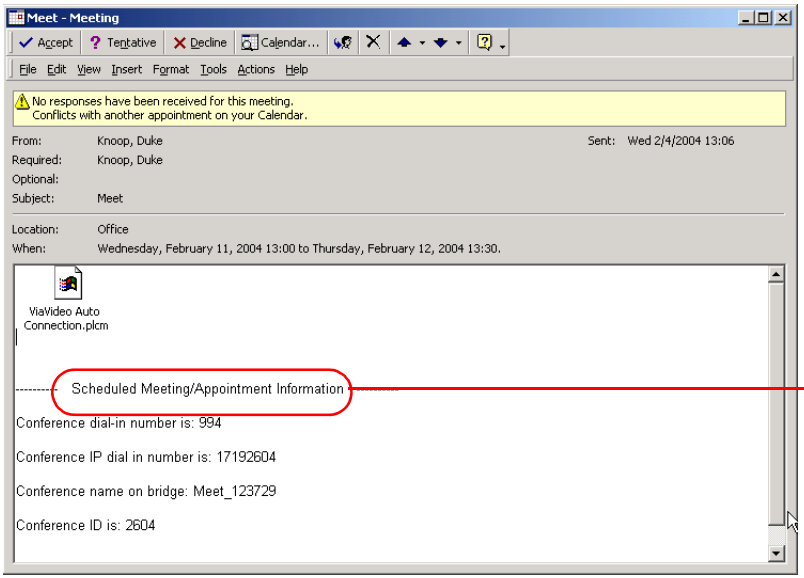
Customization From the MGC Personal Scheduler Configuration Window

The following items can be customized in the Outlook *New* menu from the *MGC Personal Scheduler Configuration* window:

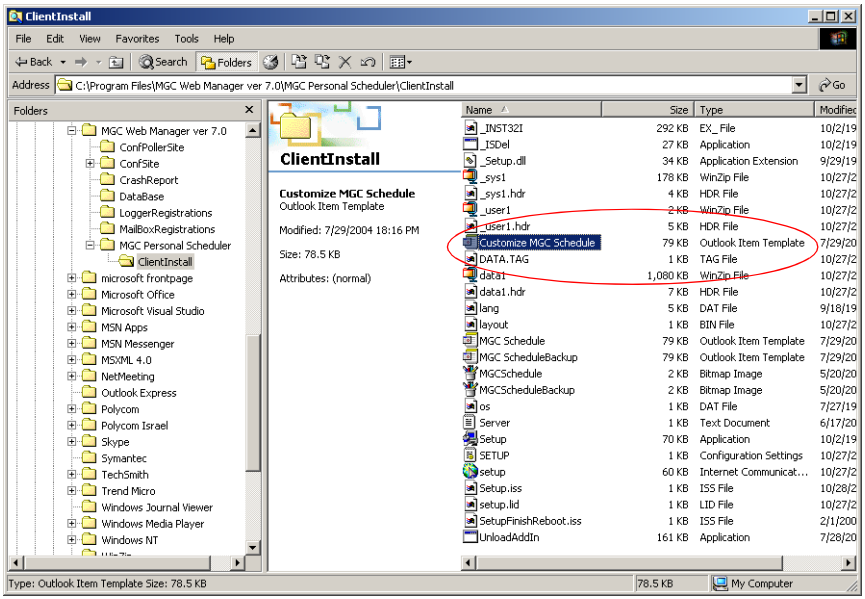
- Meeting request menu name
- Appointment request menu name
- Menu icons



The following Message Header title can be customized in the E-mail message from the *MGC Personal Scheduler Configuration* window.



The *MGCScheduler.oft* file is automatically backed up in the *CustomizeMGCSchedule.oft* file located in the *ClientInstall* folder.



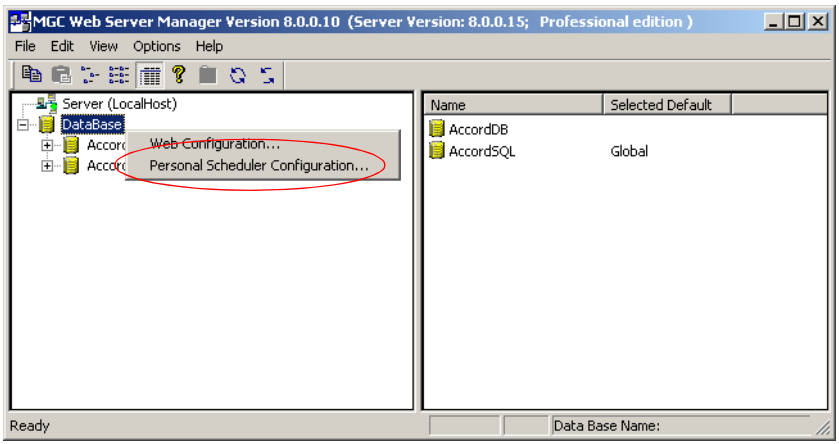
When the MGC Personal Scheduler is re-installed, for example with you upgrade your version, the administrator can simply copy and paste the Visual Configuration information from the *CustomizeMGCSchedule.oft* file to the *MGCScheduler.oft* file prior to deploying the Client application. This saves the administrator the need to re-configure the Visual Configuration.

MGC Personal Scheduler Parameter Configuration

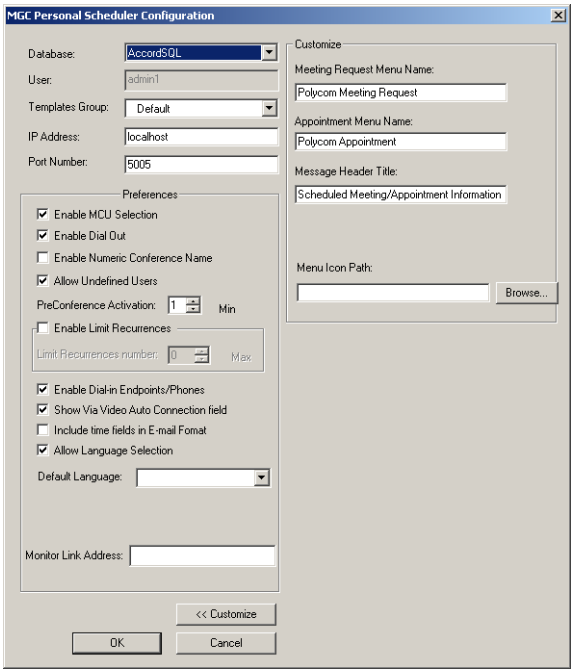
After the MGC Web Manager is connected to the Personal Scheduler Server and at least one MCU has been connected, you can set the Personal Scheduler configuration parameters in the MGC Web Manager application.

To configure Personal Scheduler from the MGC Web Manager:

1. Right-click the *Database* icon, and then click **Personal Scheduler Configuration**.



The *MGC Personal Scheduler Configuration* dialog box opens.



2. Fill in the fields as described in Table 2-2.

Table 2-2: MGC Personal Scheduler Configuration Fields

Field	Description
Database	Select the database that contains the Conference template that will be used to schedule conferences from the Personal Scheduler. The database contains five default Conference templates. For more information on templates, see Personal Scheduler - Appendix A or the MGC Web Server Manager, Chapter 4.

Table 2-2: MGC Personal Scheduler Configuration Fields (Continued)

Field	Description
User	Select the User name that the client software uses to login to the database. This login is transparent to the User. Each User is assigned permissions which defines his/her access rights to various Groups. It is strongly recommended to use User **admin1**, as this User has full read and write permissions in the database. If you change the User, you must make sure that this User has all permissions assigned to the Group selected, and that the Group has valid templates under it.
Templates Group	Select the Templates Group name that the client software uses to login to the database. This login is transparent to the User. Template Groups increase system security as they limit the access to conferences and participant data to authorized users only. The Groups contains the templates that are used with the Personal Scheduler application. It is strongly recommended to use the Templates Group **Default**, as this is the Group where the default templates are located. If you change the Group, you must make sure that the Group has a User with all permissions assigned to it, and that the Group has valid templates under it.
IP Address	Enter the IP Address of the computer on which the Personal Scheduler server is installed. The IP Address automatically gets written to the server.txt file, which is part of the client installation files. It is distributed to all end-users and is used by the client application to connect to the Personal Scheduler Server. **Note:** In this field, We recommend you put the computer name (preferred) of the server or the IP address of the server.

Table 2-2: MGC Personal Scheduler Configuration Fields (Continued)

Field	Description
Port Number	Enter the Port number of the computer on which the Personal Scheduler server is installed. The Port number automatically gets written to the server.txt file, which is part of the client installation files. It is distributed to all end-users and is used by the client application to connect to the Personal Scheduler Server. **Note:** When *Polycom WebOffice* software is installed the port number settings in the Web Server Manager change to 5005. In that case, in the Web Server Manager you are required to manually change the *MGC Personal Scheduler Configuration* port settings to 5006.
Preferences	
Enable MCU Selection	When this check box is selected, an MCU list appears in the *Polycom Office* window when creating a new Appointment or Meeting in Outlook. This list contains 'Auto' and a list of connected MCUs. When 'Auto' is selected, the system selects the MCU according to the order in which they are defined in the MCU table in the MGC Server Manager.
Enable Dial Out	When this check box is selected, the user can select dial-out endpoints. When the conference starts the MCU will call these endpoints.
Enable Numeric Conference Name	When this check box is selected, the conference name can be numerical. This is an advantage for dial-in IP endpoints that do not accept alphabetic strings. If this check box is cleared, the conference name can only be alphabetical.
Allow Undefined Users	When this check box is selected, any user with the MGC Personal Scheduler can schedule a conference. If this check box is cleared, only users that are predefined on the Server Manager can schedule conferences.

Table 2-2: MGC Personal Scheduler Configuration Fields (Continued)

Field	Description
PreConference Activation	You can select to start the reservation x minutes before the conference start time. This is recommended to allow dial-in participants to connect to the conference a few minutes before the start time. The default value is 10 minutes.
Enable Limit Recurrences	Click **Enable Limit Recurrences**. The *Limit Recurrences number* is enabled. Select the number of reservation recurrences permitted when initiating an meeting invitation.
Enable Dial-in Endpoints/Phones	When selected the Dial-in Endpoints/Phones field appears in the Outlook Polycom Office window. If disabled the user cannot view or edit this field, however the definition settings are still taken from the conference Reservation Template, enabling participant dial-in.
Show Via Video Auto Connection field	When selected, the *Show Via Video Auto Connection field* appears in the Outlook *Polycom Office* window. The *.plcm file can then be added as an (optional) attachment to the meeting invitation. When the meeting participants click on the ViaVideo link, their ViaVideo endpoint automatically opens and connects to the On Going conference.
Include time fields in E-mail Format	There are a number of “time” fields marked by an asterisks (*) in the *Customize E-mail Format* window. For more information see, the Web Server Manager User’s Guide, Chapter 4. These fields can be enabled by the administrator in any Personal Scheduler Client E-mail by selecting the *Include time fields in E-mail Format* option in the *Web Server Manager - Personal Scheduler Configuration* window.

Table 2-2: MGC Personal Scheduler Configuration Fields (Continued)

Field	Description
Allow Language Selection	Select this box to enable the default language selection. The default language of the MGC Personal Scheduler is the default language of the computer's operating system. **Default Language -** From the drop down box select the default language of the WebCommander Web site. Language selection allows for a different language to be set as the default language for the text of the automatically generated E-mail messages and for the Personal Scheduler pop-up message boxes in Outlook. The languages supported include: • English • French • German • Chinese • Chinese Traditional • Japanese • Portuguese • Spanish • Norwegian • Italian • Russian • Swedish • Croatian • Hungarian • Polish • Slovak
Monitor Link Address	The IP link (address) of the Personal Scheduler monitor module. Enter either the DNS name or IP address.

Table 2-2: MGC Personal Scheduler Configuration Fields (Continued)

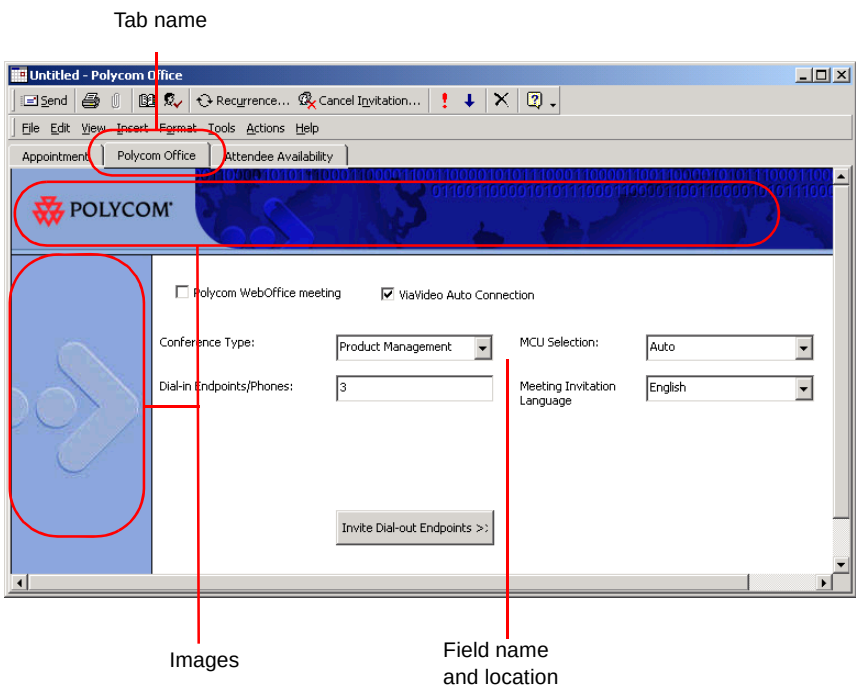
Field	Description
Customize	
Meeting Request Menu Name	Specify the Meeting request menu name.
Appointment Menu Name	Enter the Appointment request menu name.
Message Header Title field	Enter the name of the E-mail Message Header.
Menu Icon Path	Enter the path of the bitmap. The File must be in .bmp format.

Customization from the Microsoft Outlook Editor

The following items can be customized in the **Polycom Personal Scheduler** tab from the *Microsoft Outlook Editor/Form Configuration* window:

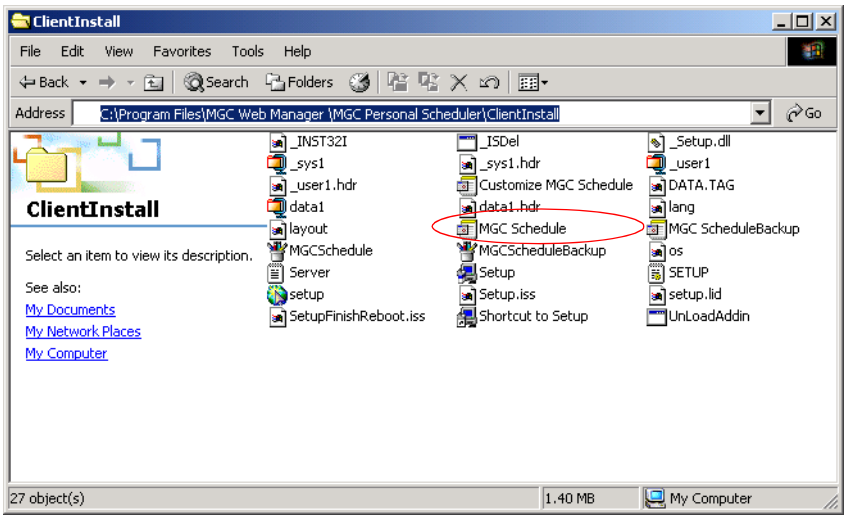
- Tab name
- Tab fields (name and location)
- Tab images
- Tab general properties

The names and location of the tab fields can be changed, but they cannot be deleted.



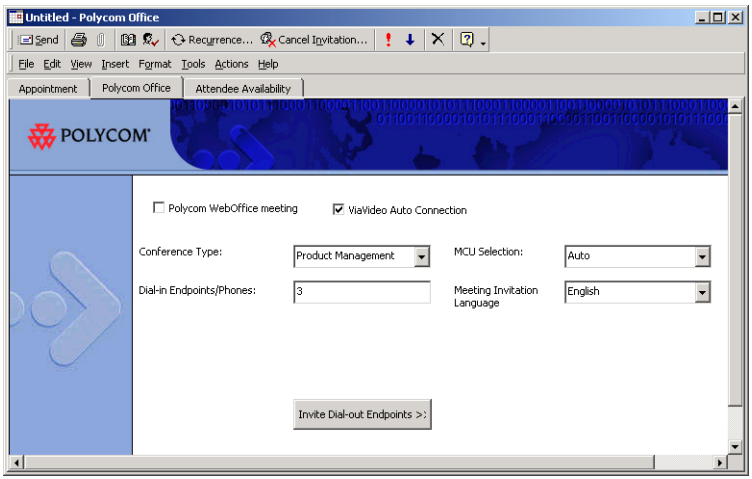
To customize the Personal Scheduler - Polycom Meeting Request properties:

1. Double click on the *MGC Schedule* file located in *MGC Personal Scheduler 9.0\MGC Personal Scheduler\ClientInstall*.

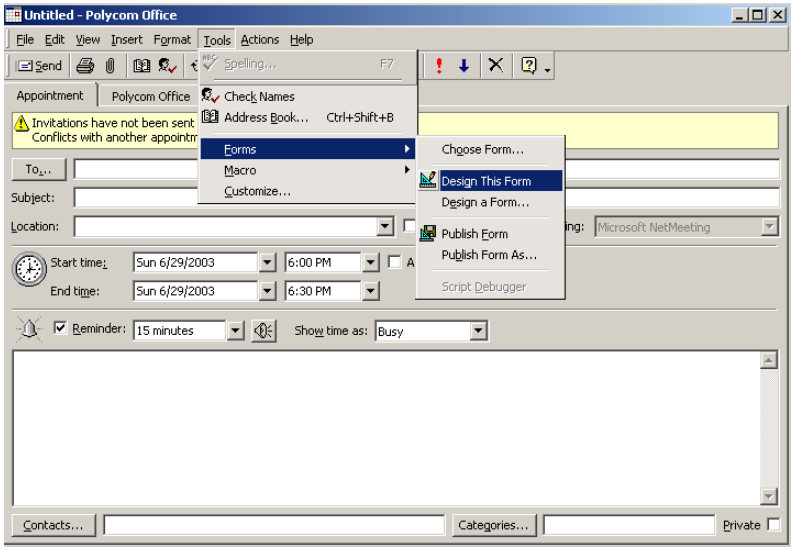


If your server does not have Outlook 2000 installed, you must copy the *MGC Schedule* file to a computer that has Outlook 2000 to customize the file. After the file has been customized, return the file to it's original location (*MGC Personal Scheduler 9.0\MGC Personal Scheduler\ClientInstall).*

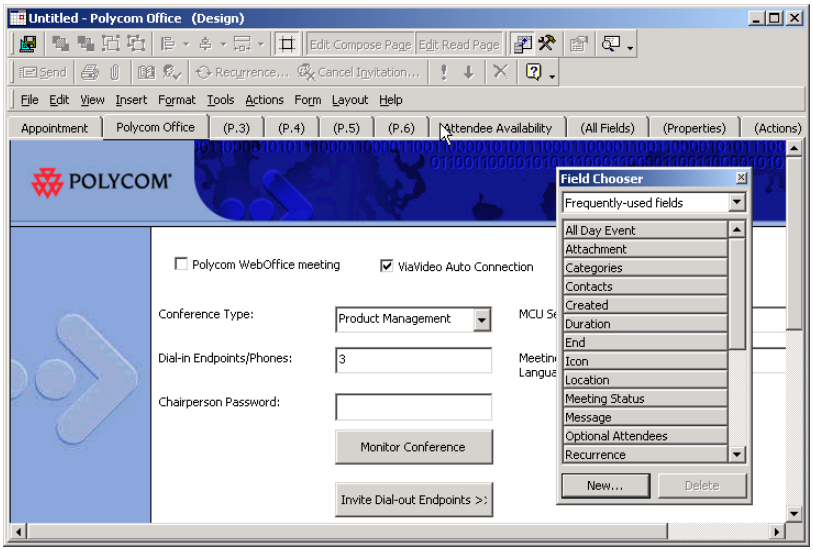
The *Polycom Office* window opens in Microsoft Outlook.



2. From the *Tools* menu, click **Forms** and then click **Design This Form**.

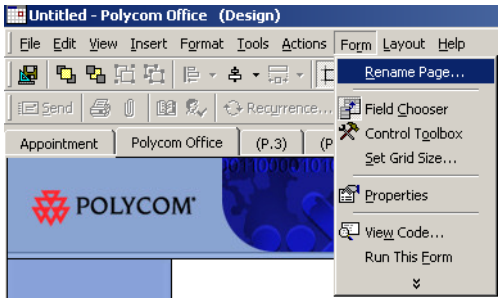


The *Design* window opens

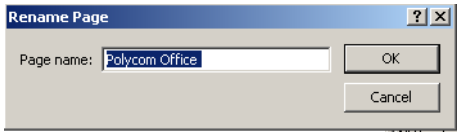


Select the *Polycom Office* tab.

3. To change the name of the tab, from the *Forms* menu, click **Rename Page**.

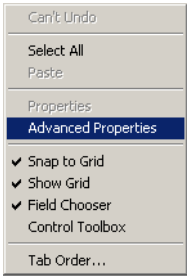


The *Rename Page* window opens.

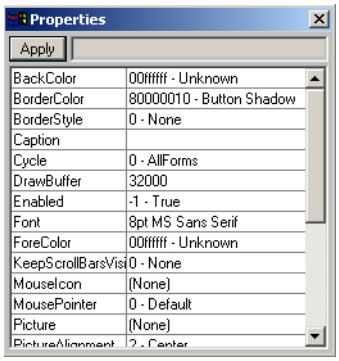


4. Enter the desired name of the tab and click **OK**.

5. To move the location of a field, click on the field name in the window, and drag and drop the field to the desired location in the window.
6. To change the name of a field, click on the field name in the window, highlight the current field name and replace it with the desired field name.
7. To change the images in the window, right click **Advanced Properties**.

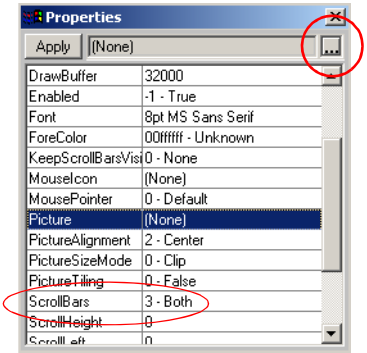


8. The *Properties* window opens.

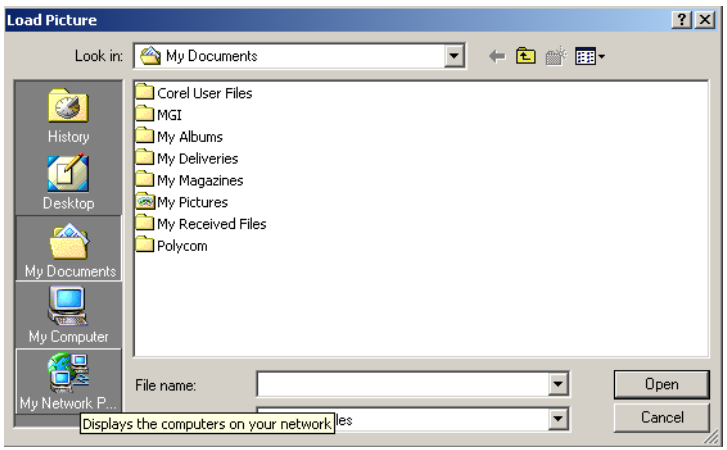


9. Scroll down and select **Picture**.

10. Click on the box located at the top right corner.



The *Load Picture* window opens.



11. Select the desired picture and click **Save**.

    The picture appears.

    For more details on changing all of the general properties of the Form, refer to your *Microsoft Outlook* documentation.

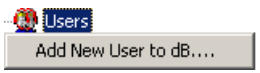
The factory default settings are stored in the file *MGC ScheduleBackup* located in *MGC Personal Scheduler 8.0\MGC Personal Scheduler\ClientInstall.* To revert to the factory default settings, replace the *MGC Schedule* file with the *MGC ScheduleBackup* file.

Setting a Password

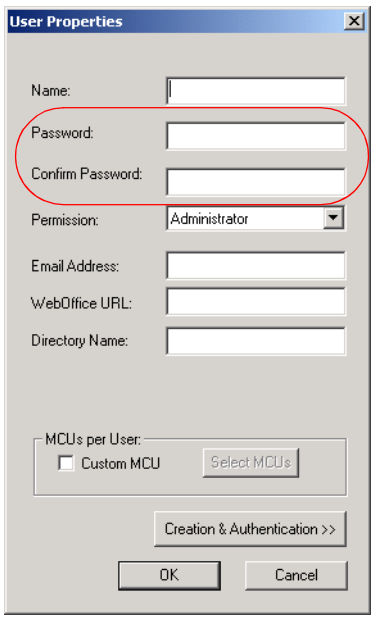
You can specify a password that the conference scheduler is required to enter prior to scheduling a conference from the MGC Personal Scheduler. This password is specified in the User Properties. If this field is left blank, a password is not required.

To specify a password for a new user:

1. In the *Browser* area, right-click the *User* icon, and then click **Add New User to DB**.



The *User Properties* dialog box opens.

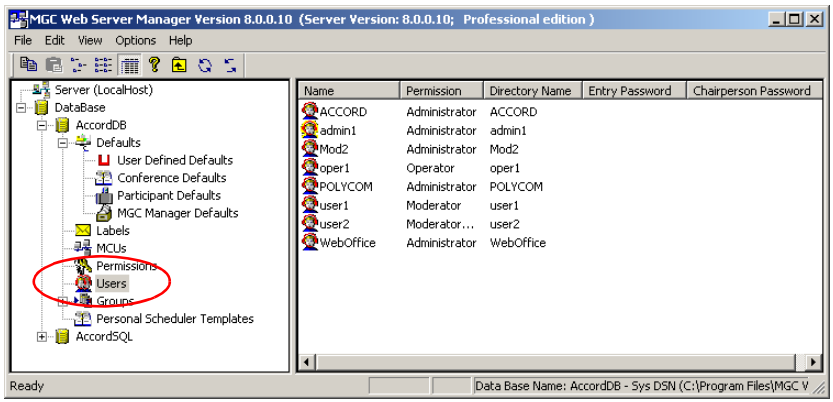


2. In the *Password* and *Confirm Password* fields, enter a password for the user, and click **OK**.

For details regarding the other fields in the User Properties dialog box, refer to the *MGC WebCommander Web Server Manager User's Guide, Version 8.0*.

To specify a password for an existing user:

1. In the *Browser* area, click the *Users* icon.
   The *Users* list is displayed in the *Status* pane.



2. Double-click on a user's name.

   The *User Properties* dialog box opens.

3. Continue with step 1 in the previous procedure.

Managing Templates

The template contains the conference parameters and is stored in the database. A template is selected by the end-user when reserving a conference in Personal Scheduler. Five default templates are included with Personal Scheduler:

- Default_CoP
- Default_Video
- Default-Audio
- SW CP
- Video-Switch

- Refer to *Appendix A* for a detailed description of the default template properties.
- Additional templates can be created by the Administrator. Refer to the *MGC Manager User's Guide* for details on defining new templates.

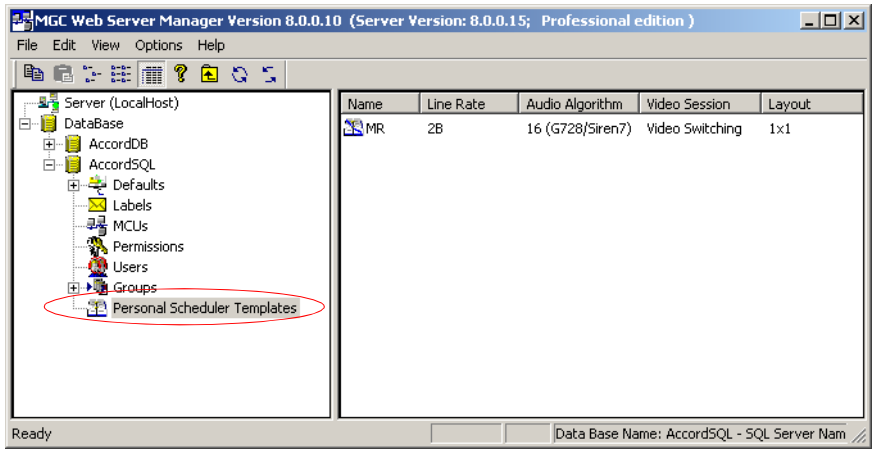
By default the templates are installed in the *Default* group in the MGC Web Server Manager. To enable all end-users access to these templates, it is strongly recommended not to move the templates to a different location.

The templates should be given meaningful names by the Administrator so that the end-user can easily identify the desired template.

To view the list of templates:

1. Click the **[+]** icon next to **Database** to expand the list.
2. Click the **[+]** icon next to **<Database name>** to expand the list.

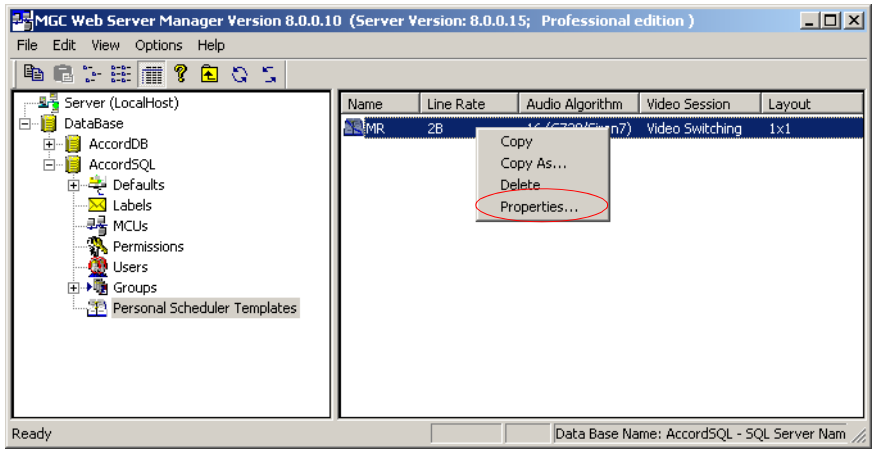
3. Double-click the *Personal Scheduler Templates* icon.



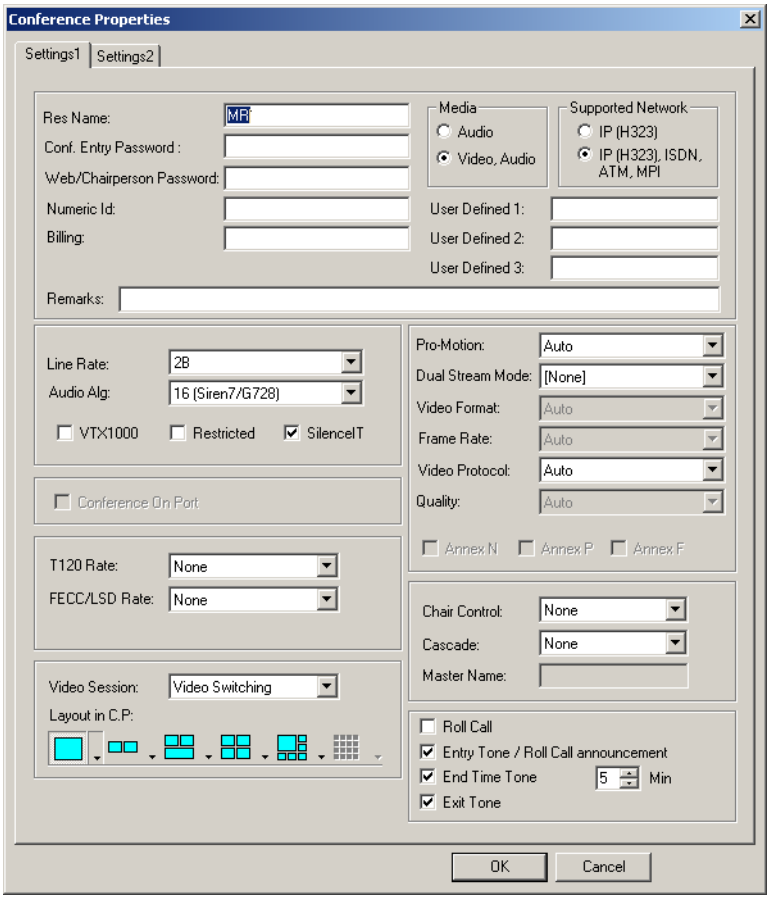
The list of templates appears.

To view the template parameters:

1. Right-click the template name and then click **Properties**.



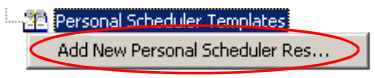
The *Conference Properties* window opens, displaying the template parameters.



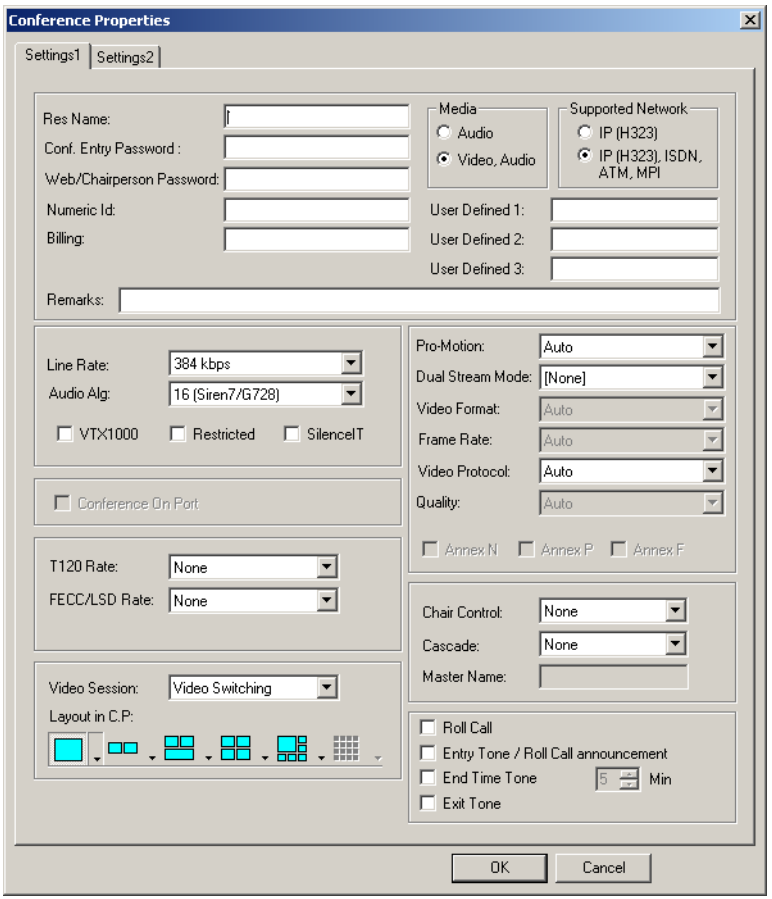
2. Refer to the *MGC WebCommander Web Server Manager - Installation and Configuration Guide*, for details on defining the template parameters.

To add a new template:

1. Right-click the *Personal Scheduler Templates* icon and then click **Add New Personal Scheduler Res**.



The *Conference Properties* window opens, displaying the template parameters.



2. Refer to the *MGC WebCommander Web Server Manager - Installation and Configuration Guide*, for details on defining the template parameters.

3

Managing Conferences

The MGC Personal Scheduler is used by end-users to schedule and reserve audio and video conferences on the MCU via Microsoft Outlook. Conferences are reserved using the **Polycom Office Appointment** or the **Polycom Office Meeting** option.

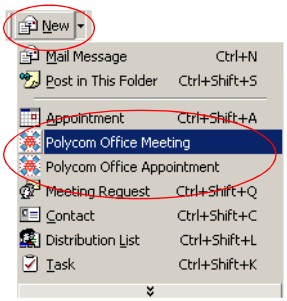
When you create a meeting, you identify the people to invite and you send them an e-mail invitation. The e-mail includes various conference parameters required to start the conference, such as the conference name, password (if applicable), and the dial-in number. When the invitee responses to your meeting request, a message appears in your OutLook - Inbox folder.

The conferencing meetings can be recurring; appointments that repeat on a regular basis. Conferences can also be modify and cancelled.

Scheduling Conferences

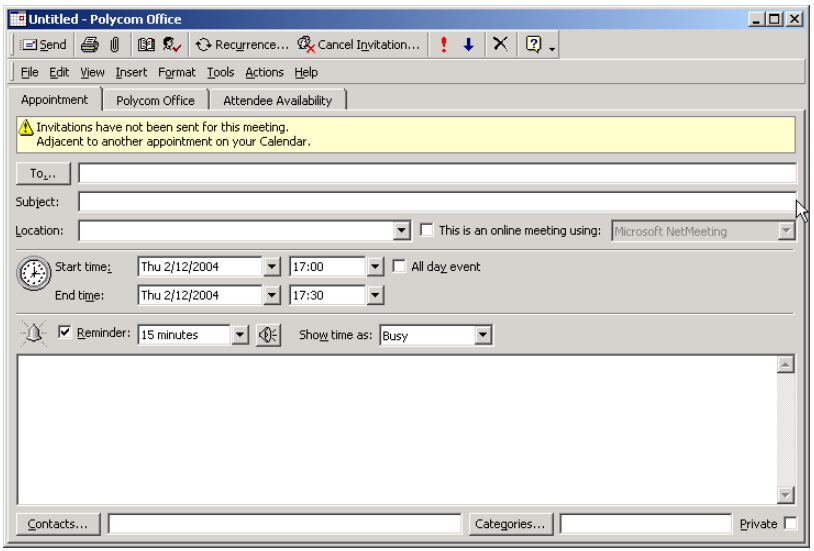
To schedule a Polycom Office audio or video conference:

1. On the *File* menu, click **New**, and then click **Polycom Office Appointment** or **Polycom Office Meeting**.



Alternatively, click the icon.

The *MGC Polycom Office Scheduler* window opens.



2. If you are scheduling a Meeting, in the *To* field, enter the participant name(s)/e-mail address(es). (This step can be skipped if you are defining an Appointment.)
3. In the **Subject** field, enter a description.

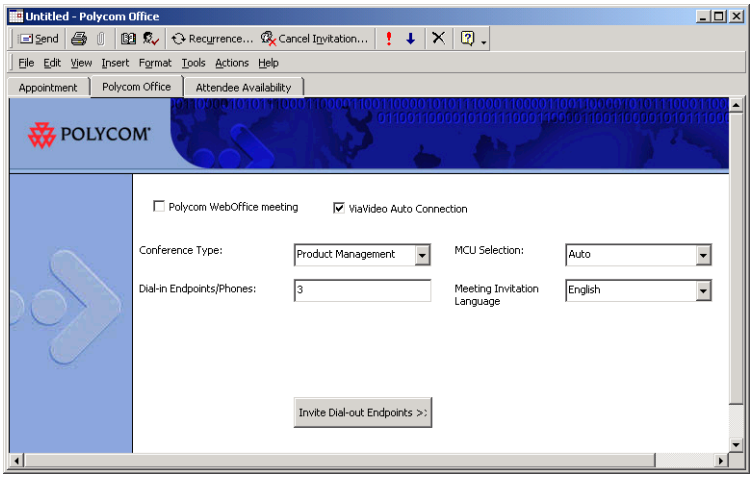
A subject must be entered to reserve the conference on the MCU. If no subject is entered, an error message is displayed.

4. Enter the start and end times.
5. Optional: Select other options you want and write an e-mail message.
6. Click the **Polycom Office** tab.

   The *Polycom Office* window opens.

The view of this window is dependant on the Personal Scheduler Configuration settings. In the Web Server Manager - Personal Scheduler Configuration window you can add or remove the following fields:

- Via Video Auto Connection
- Dial-in Endpoints/Phones
- Enable MCU selection
- Enable language selection



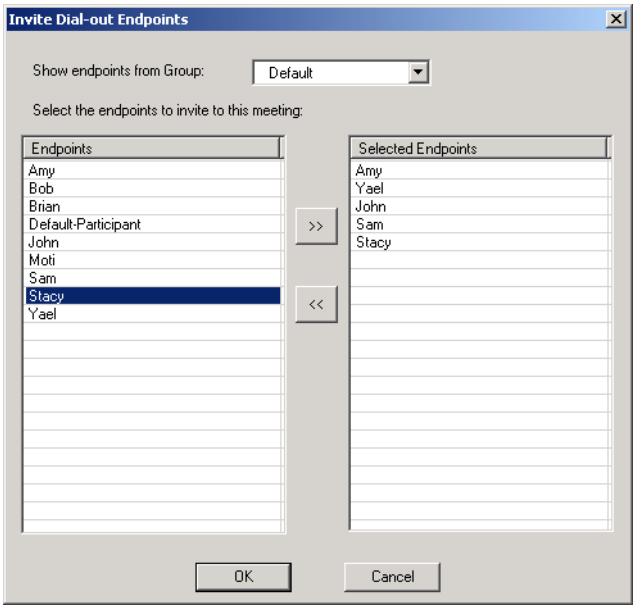
7. Select the **Polycom Office** check box if you want this meeting integrated with your Polycom Web Office meeting.

8. Select the **ViaVideo Auto Connection** check box to attach a ViaVideo attachment to a Meeting invitation. When the Meeting participant clicks the ViaVideo link, their ViaVideo endpoint automatically opens and connects to the On Going conference.
9. From the *Conference Type* drop-down box select the appropriate conference template. The conference template contains pre-defined parameters. For more details on the templates, see Appendix A.
10. From the *MCU Selection* drop-down box select the desired MCU. The selected MCU is stored in the registry and becomes the default MCU. If **Auto** is selected, the MCU will be selected as defined in the Server Manager. For more details on MCU selection, see Chapter 2, “MGC Personal Scheduler Configuration” on page 2-14”.
11. Enter the minimum number of participants. This is the minimum number of participants for which the system will reserve resources on the MCU.

For additional information on Conference Type, MCU Selection and Minimum Participants, consult your Administrator.

12. From the *Meeting Invitation Language* drop-down box select the language that is to appear on the Meeting Invitation.
13. To invite dial-out endpoints, click the **Invite Dial-out Endpoints** button.

The *Invite Dial-out Endpoints* window opens.



Endpoints are saved in the database and configured with a leased line connection. When the conference starts the endpoint is automatically connected. In a conference with manual dial-out settings, the leased line must be connected manually.

14. To add an endpoint, in the *Endpoints* database list, select the endpoint to be added, and click the double right arrow button [>>]. The endpoint is added to the *Selected Endpoints* list.

    To remove and endpoint, in the *Selected Endpoints* list, select the endpoint to be removed, and click the double left arrow button [<<]. The endpoint is moved to the *Endpoints* list.

15. Click **OK**.

16. If you scheduled an Appointment, click **Save and Close**. If you scheduled a Meeting, click **Send**. A confirmation window opens indicating the Appointment/Meeting has been scheduled on the MCU.

17. Click **Save and Close** to confirm the meeting, or click **Edit** to modify the meeting properties.

18. Send the e-mail.

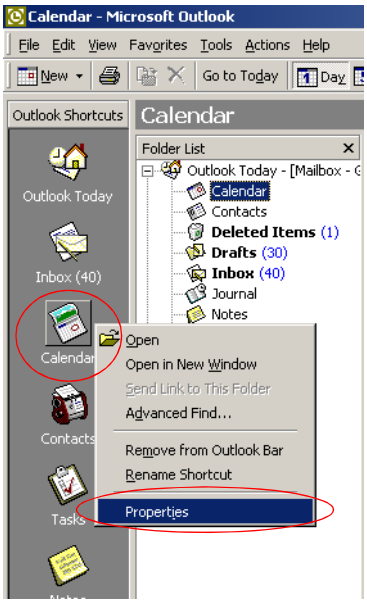
The reservation can be recurring. For details, see “Scheduling Recurring Appointments and Meetings” on page 3-16.

Scheduling the Reservation Directly From the Calendar

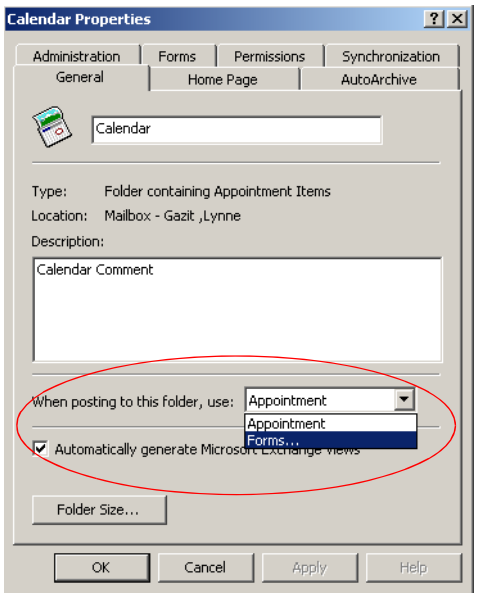
You can easily schedule a reservation by selecting a block of time on the calendar. To do this you must first configure the MGC Personal Scheduler to be the default appointment form.

To configure the appointment form:

1. Right-click the *Calendar* icon and then click **Properties**.

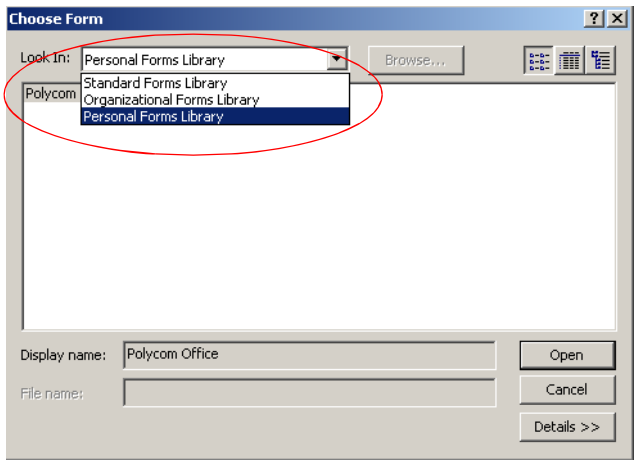


The *Calender Properties* dialog box opens.



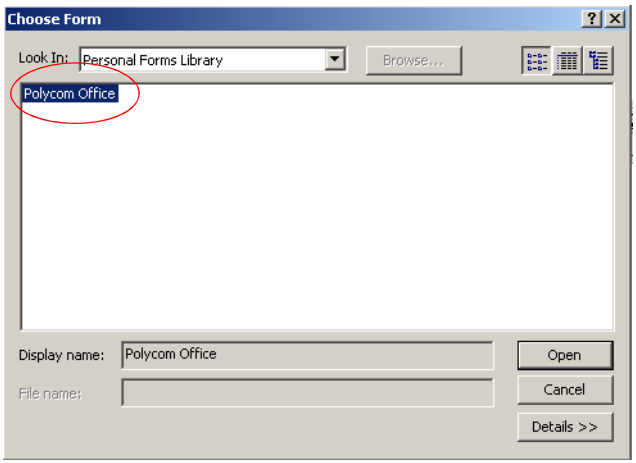
2. From the *When posting to this folder, use* drop-down list, select **Forms**.

   The *Choose Form* dialog box opens.

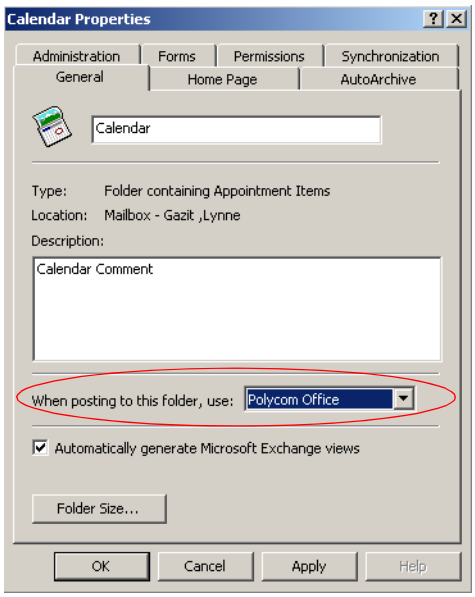


3. From the *Look In* drop-down list, select **Personal Forms Library**.

4. Select **Polycom Office** and click **Open**.



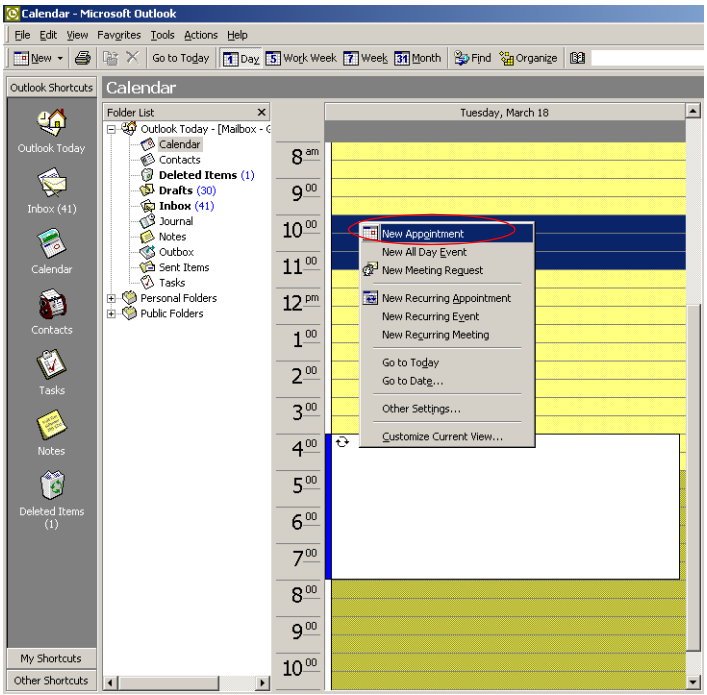
The *Calendar Properties* dialog box opens. The **Polycom Office** option is now available in the *When posting to this folder, use* drop-down list.



Click **OK**. The *Calendar Properties* dialog box closes and Polycom Office (MGC Personal Scheduler) is set as the default calendar form.

To schedule the reservation on the calendar:

1. Select the block of time on the calendar for the reservation.
2. Right-click the selected block of time and then click **New Appointment**.



The *Polycom Office* window opens.

3. Continue with step 7 on page 3-3.

E-mail Signature

The e-mail received by the meeting invitees contains a signature that includes conference parameters required to start the conference. However a participant may receive an attachment that includes a .plcm file, which contains a ViaVideo link. When the user opens the attachment, the ViaVideo endpoint on his desktop automatically opens and connects to the On Going conference.

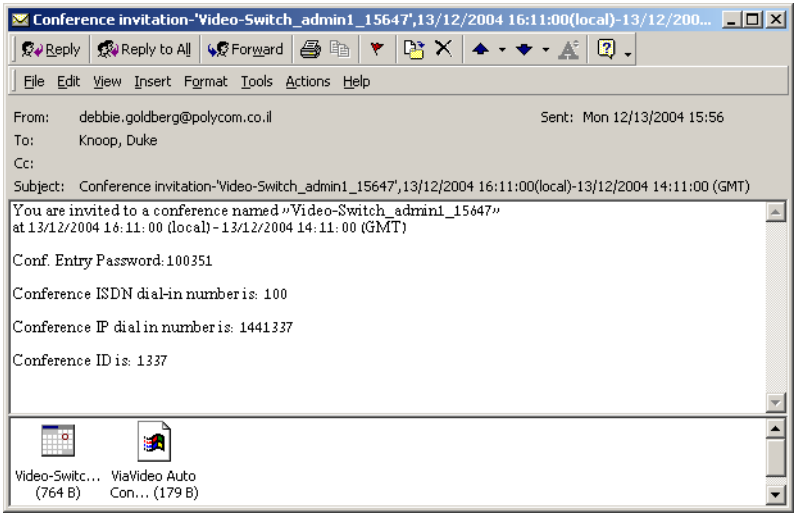


Table 3-1 describes the signature fields.

Table 3-1: E-mail Signature Fields

Field	Description
Conference dial in number is:	This is the conference dial-in number. This number is defined in the *MCU Properties* dialog box. For more information, see Chapter 2, “Adding a New MCU” on page 2-10”.
Conference IP dial in number is:	This is the conference IP dial in number. It is composed of the IP prefix and the conference name on the MCU. The IP prefix is defined in the *MCU Properties* dialog box. For more information, see Chapter 2, “Adding a New MCU” on page 2-10”.
Conference Entry Password	This is the password used by conference participants to access a conference via the Entry Queue or IVR Queue.
Conference name on bridge:	This is the name of the conference as it appears in the WebCommander site. The name is an automatically generated number.
Conference ID	A Conference ID is a unique number (Numeric ID) assigned to a conference identifying it to the system. It can be used by the participants to be routed and to access the conference. A Conference ID can be assigned in two ways: Automatic or Manual. To manually assign the Conference Numeric ID, use the number of digits defined in the appropriate flag in the *System.cfg* file. If the Conference Numeric ID is already in use in another conference, an error message will be displayed. If left blank and the MCU is configured to assign one once the conference is saved to the MCU. **Note:** If the MCU is configured to support only *automatic* assignment of Numeric Conference IDs, then this field is disabled and the system will automatically assign a Numeric Conference ID after you save the conference on the MCU.

Table 3-1: E-mail Signature Fields (Continued)

Field	Description
Web Office URL:	This is a link to your Polycom WebOffice site. This is only applicable if you have WebOffice installed on your computer and you have selected the Polycom WebOffice check box when setting up a reservation.

MGC Manager Reservation Remarks

Details of the conference are retrieved from the MGC Manager. In the On Going Conference Properties dialog box in the Remarks field, a conference reserved with Personal Scheduler is indicated by the words *Outlook Reservation*, and the conference subject, date and the e-mail address of the organizer is provided, as in the following example:

```
Outlook Reservation - Subject: Brand Meeting; Date:
09/11/2004  at 11:59 (GMT); Organizer:
John.Smith@polycom.com
```

To view the reservation remarks:

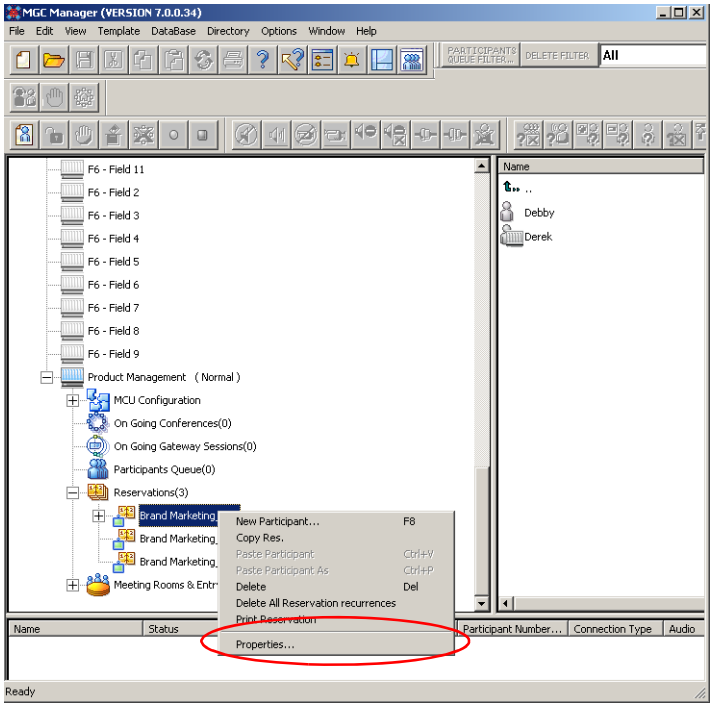
1. In the MGC Manager, double-click the icon of the MCU on which the Reservation was scheduled.

   A list of options appears below the *MCU's* icon.

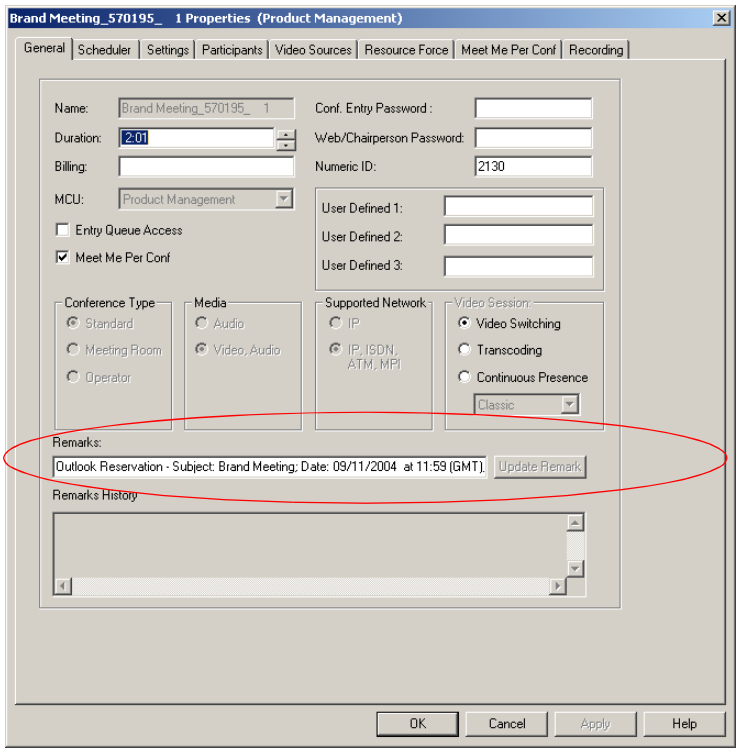
2. Double-click the *Reservations* icon, or click the plus [+] icon next to the *Reservations* icon.

   The *Reservations* list for the selected MCU is displayed.

3. Right click on the Reservation name and select **Properties**.



4. The *Properties* dialog box opens, displaying the *Remarks* field.



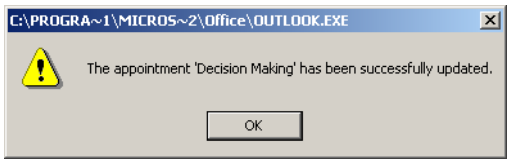
Modifying Appointments and Meetings

Modifying an Appointment or Meeting in Outlook also modifies the reservation on the MCU.

Appointments and Meetings are modified using the standard Microsoft Outlook conventions. There are two ways to modify the reservation:

- From the Appointment/Meeting window
- Interactively moving the Appointment/Meeting to the new date and time using drag and drop

After the Appointment or Meeting is modified, a window opens indicating that the reservation has been updated on the MCU.



Canceling Appointments and Meetings

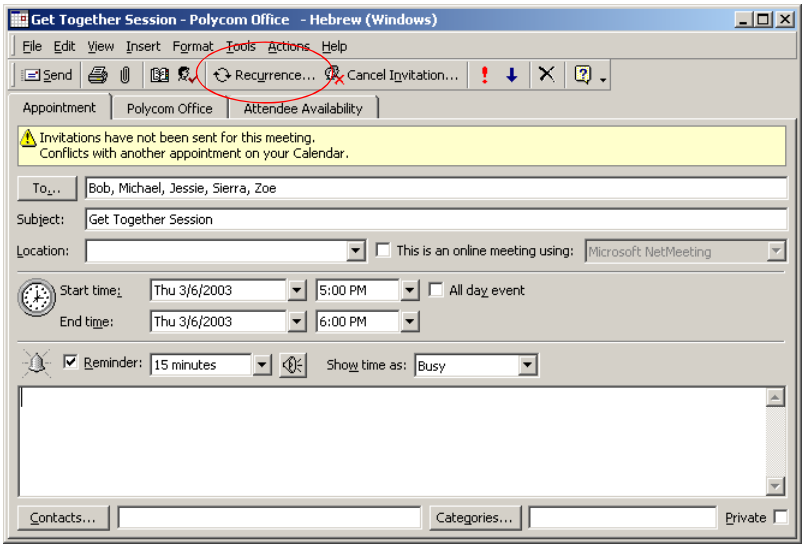
Canceling an Appointment or Meeting in Outlook also deletes the reservation from the MCU.

Appointments and Meetings are cancelled using the standard Microsoft Outlook conventions.

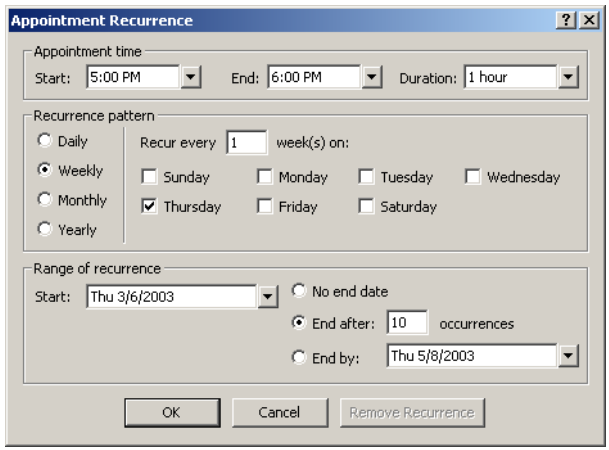
Scheduling Recurring Appointments and Meetings

A recurring appointment or meeting is a reservation that occurs repeatedly. For example, a reservation that occurs on a regular basis, such as a weekly conference, can be designated as recurring. All recurrences are reserved on the MCU.

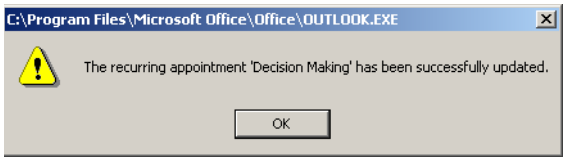
1. Schedule the Appointment or Meeting as described in “Scheduling Conferences” on page 3-2.
2. Click the **Recurrence** button.



The *Appointment Recurrence* window opens.



3. Using the standard Outlook conventions, select the recurrence pattern and range of recurrence options you want.
4. Click **OK**. The recurring reservations are added to the Appointment or Meeting and a confirmation box opens indicating that the reservation has been made.



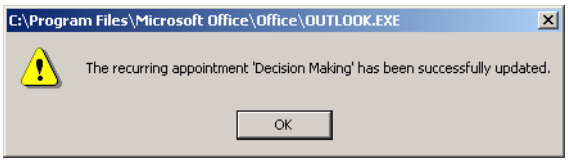
Modifying Recurring Appointments or Meetings

You can change the appointment time or range the of recurrences for all instances of an Appointment or Meeting. You can update one occurrence, or multiple occurrences.

Modifying a recurring Appointment or Meeting in Outlook also modifies the reservation on the MCU. Appointments and Meetings are modified using the standard Microsoft Outlook conventions.

After one occurrence of the Appointment or Meeting is modified, the following window opens indicating that the reservation has been updated on the MCU.

After all occurrences of the Appointment or Meeting are modified, the following window opens indicating that the reservation has been updated on the MCU.



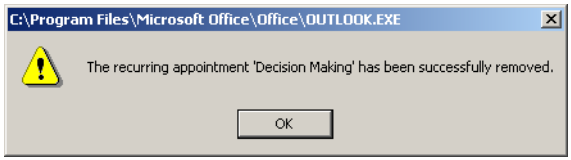
Canceling Recurring Appointments and Meetings

Canceling a Recurring Appointment or Meeting also deletes the reservation in the MCU. You can cancel one occurrence, or multiple occurrences.

Appointments and Meetings are cancelled using the standard Microsoft Outlook conventions.

After one occurrence of the Appointment or Meeting is cancelled, the following window opens indicating that the reservation has been removed from the MCU.

After all occurrences of the Appointment or Meeting are cancelled, the following window opens indicating that the all occurrences of the reservation have been removed from the MCU.



Canceling Recurring Appointments/Meetings

Canceling a recurring Appointment or Meeting in Outlook also deletes the reservation from the MCU. You can cancel one occurrence or all occurrences.

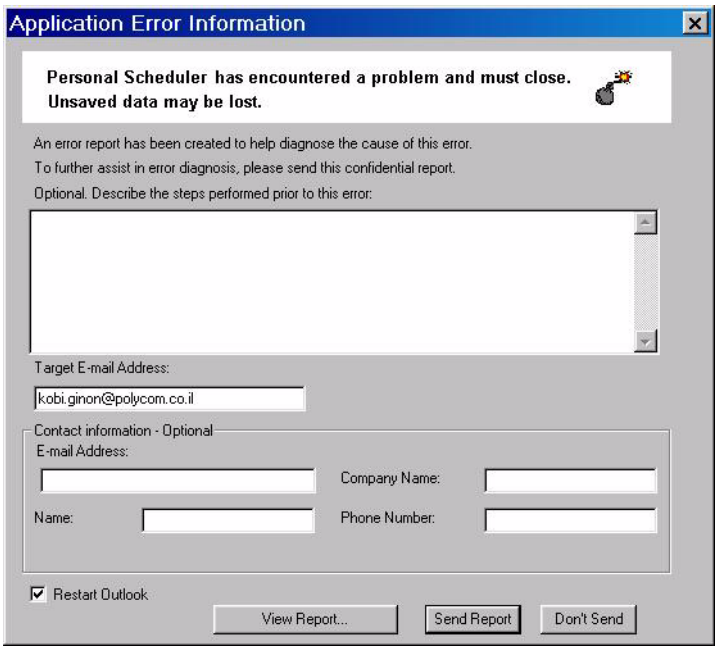
Recurring Appointments and Meetings are cancelled using the standard Microsoft Outlook conventions.

Application Exception

When an exception occurs in the Personal Scheduler/Client an *Application Error Information* window can appear on screen. The operator/user can choose to send an email to support with information that helps analyze the source of the problem.

This function can be disabled in the Web Server Manager. In the Options menu, select *Administrator Send Email Configuration* and clear the *Send Email Notification* check box.

1. When an exception occurs in the Personal Scheduler/Client application, the *Application Error Information* dialog box displays.



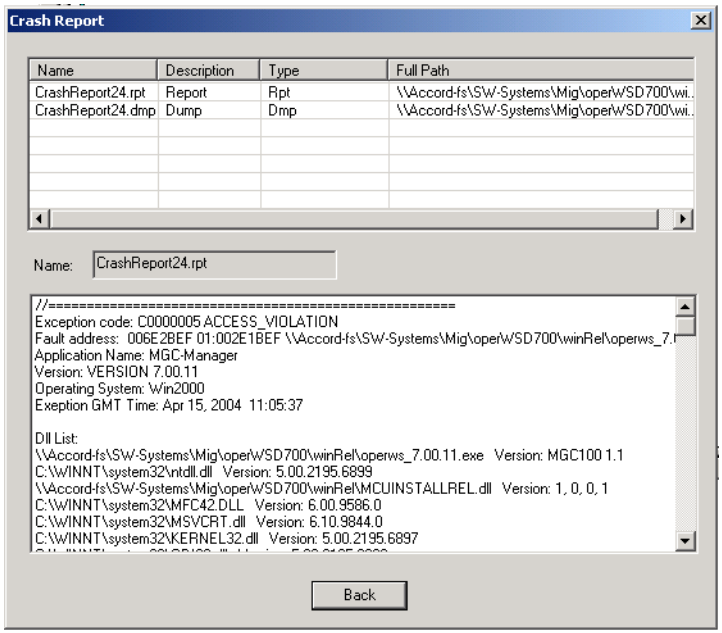
You can perform any one of the following actions:

— Describe the reasons or steps leading to the exception

— Enter the destination email address

— Enter your contact details

2. Click **View Report**, to read technical information about the exception. The *Crash Report* dialog box is displayed.



You can view and read details about the exception.

— To return to the *Application Error Information*, click **Back**

- In the *Application Error Information* dialog box, click **Send Report**, to email the report.
  When you have sent the email, a confirmation dialog box is displayed.

  — Click **OK** to exit.

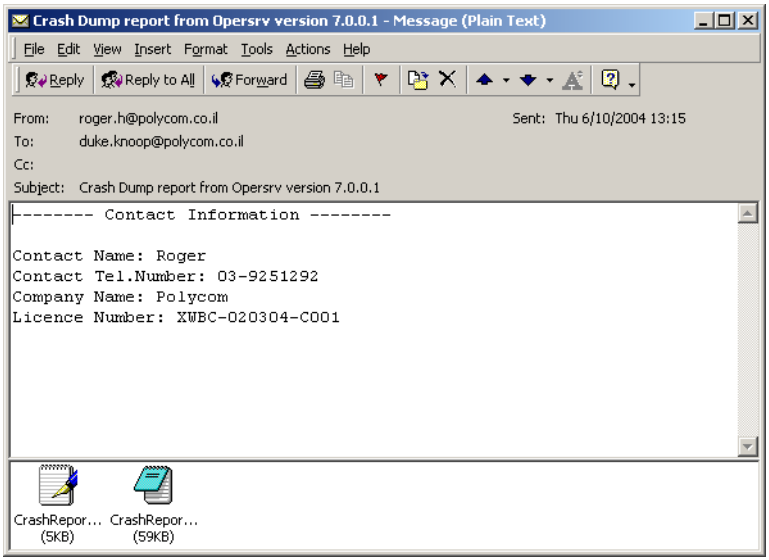
3. Click **Don't Send**, if you do no want to email the report.

Viewing the Report

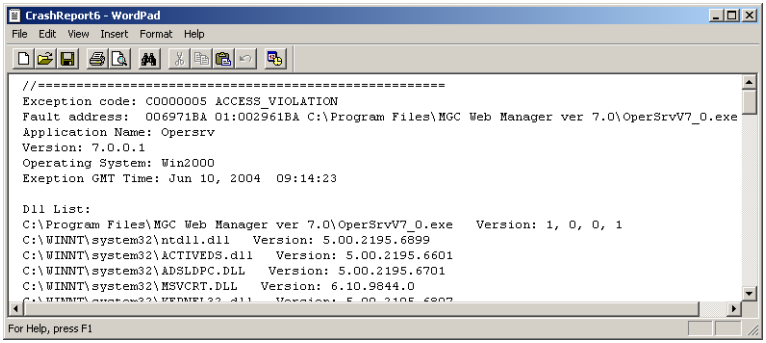
A crash report can be sent from the Personal Scheduler in an email based on the settings in the Web Server Manager. When enabled, the email sent to the addressee and includes two attachments:

- Report file (.rpt) - a text file
- Dump file (.dmp) - a source code file (for internal use only)

Shown below is an actual email with attachments.



You can view the report (.rpt) file with any text browser as shown below:



The contents of this report is identical to the information that can be viewed in the *Crash Report1.rpt* file.

A

Appendix A: Default Templates

There are five default Conference templates included in the MGC WebCommander database:

- **COP (Default_COP)**
- **Video (Default_Video)**
- **Audio (Default-Audio)**
- **Software Continuous Presence (SW CP)**
- **Video Switching (Video-Switch)**

For a detailed description of these fields, refer to the MGC Manager User's Guide Volume I.

Default Conference Template Properties - Default_COP

Parameter	Value
General	
Name	Default_COP
Remarks	(empty)
Duration	2:00 Hours
Billing	(empty)
Meet Me Per Conf.	Yes
Entry Queue Access	No
Conference Entry Password	(empty - to be allocated by system)
Web/Chairperson Password	(empty - to be allocated by system)
Start on MCU	Auto
Numeric ID	(empty)
Conference User Defined 1-3	(empty)
Conf. Type	Standard
Media	Audio, Video
Networks	IP, ISDN, ATM, MPI
Video Session	Continuous Presence - Classic
Participants	None Defined
Basic	
Restricted	No
Line Rate	384 Kbps
Video Rate In/Out	(disabled)
Conference on Port	Yes

Parameter	Value
Same Layout	Yes (greyed out)
Lecture Mode	None
Lecturer Name	Auto select (greyed out)
Timer	(disabled)
Interval	10 sec. (greyed out)
FECC/LSD Rate	None
T120 Rate	None
Audio Alg.	Auto
VTX1000	(disabled)
SilenceIT	Yes (greyed out)
Pro-Motion	None
Dual Stream Mode	None
Video Protocol	Auto
Video Format	Auto
Frame Rate	disabled
Quality	Auto
Annex P	No
Annex N	No
Annex F	No
Roll Call	No
Entry Tone	Yes
End Time Alert Tone	Yes - 5 minutes
Exit Tone	Yes

Parameter	Value
Advanced	
Auto Termination	Yes
Minutes Before First Join	25
Minutes After Last Quit	5
Dial-Out Manually	No
Allow undefined Participants	Yes
Min Number of Participants	3
Max Number of Participants	Auto
Cascade	None
Master	None
Chair Control	None
Label	None
Attended	None
Message Service Name	Empty
Start Conf. Requires Chairperson	(disabled)
Terminate After Chairperson Exits	(disabled)
Mute ‘Meet Me’ Parties	(disabled)
Lock	No
On Hold	(disabled)
Enable Invite	(disabled)
Talk Hold Time	1.5
Audio Mix Depth	3
Encryption	No

Parameter	Value
Meet Me Per Conf	
Limited Occurrences	(disabled)
Number of Occurrences	(disabled)
Video Layout	
Video Layout	5+
Background	(enabled)
Layout Border	Yes
Speaker Notation	Yes
Recording	
Enable Recording	No
Recording Link Name	Empty
Start Recording	Immediately (greyed out)

Default Conference Template Properties - Default_Video

Parameter	Value
General	
Name	Default_Video
Remarks	(empty)
Duration	2:00 Hours
Billing	(empty)
Meet Me Per Conf.	Yes
Entry Queue Access	No
Conference Entry Password	(empty - to be allocated by system)
Web/Chairperson Password	(empty - to be allocated by system)
Start on MCU	Auto
Numeric ID	(empty)
Conference User Defined 1-3	(empty)
Conf. Type	Standard
Media	Audio, Video
Networks	IP, ISDN, ATM, MPI
Video Session	Continuous Presence - Classic
Participants	None Defined
Basic	
Restricted	No
Line Rate	384 Kbps
Video Rate In/Out	(disabled)
Conference on Port	Yes

Parameter	Value
Same Layout	No
Lecture Mode	None
Lecturer Name	Auto select (greyed out)
Timer	(disabled)
Interval	10 sec. (greyed out)
FECC/LSD Rate	None
T120 Rate	None
Audio Alg.	Auto
VTX1000	Yes
SilenceIT	Yes (greyed out)
Pro-Motion	None
Dual Stream Mode	None
Video Protocol	Auto
Video Format	Auto
Frame Rate	Auto
Quality	Auto
Annex P	No
Annex N	No
Annex F	No
Roll Call	No
Entry Tone	Yes
End Time Alert Tone	Yes - 5 minutes
Exit Tone	Yes

Parameter	Value
Advanced	
Auto Termination	Yes
Minutes Before First Join	25
Minutes After Last Quit	5
Dial-Out Manually	No
Allow undefined Participants	Yes
Min Number of Participants	3
Max Number of Participants	Auto
Cascade	None
Master	None
Chair Control	None
Label	None
Attended	None
Message Service Name	Empty
Start Conf. Requires Chairperson	(disabled)
Terminate After Chairperson Exits	(disabled)
Mute ‘Meet Me’ Parties	(disabled)
Lock	No
On Hold	(disabled)
Enable Invite	(disabled)
Talk Hold Time	1.5
Audio Mix Depth	3
Encryption	No

Parameter	Value
Meet Me Per Conf	
Limited Occurrences	(disabled)
Number of Occurrences	(disabled)
Video Layout	
Video Layout	5+
Background	(enabled)
Layout Border	Yes
Speaker Notation	Yes
Recording	
Enable Recording	No
Recording Link Name	empty
Start Recording	Immediately (greyed out)

Default Conference Template Properties - Default-Audio

Parameter	Value
General	
Name	Default_Audio
Remarks	(empty)
Duration	2:00 Hours
Billing	(empty)
Meet Me Per Conf.	Yes
Entry Queue Access	Yes
Conference Entry Password	(empty - to be allocated by the system)

Parameter	Value
Web/Chairperson Password	(empty - to be allocated by the system)
Start on MCU	Auto
Numeric ID	(empty)
Conference User Defined 1-3	(empty)
Media	Audio
Networks	IP, ISDN, ATM, MPI
Participants	None defined
Advanced	
Auto Termination	Yes
Minutes Before First Joint	25
Minutes After Last Quit	5
Dial Out Manually	No
Allow undefined Participants	Yes (greyed out)
Min number of Participants	3
Max Number of Parties	Auto
Audio Mix Depth	3
Encryption	No
Label	None
Audio Alg.	56(G.711) - Greyed out
VTX1000	Yes
SilenceIT	Yes
IVR	Yes
IVR Service Name	(empty - the default service is selected)

Parameter	Value
Start Conf. Requires Chairperson	Yes
Terminate After Chairperson Exits	Yes
Mute ‘Meet Me’ Parties	No
Lock	No
On Hold	No
Enable Invite	Yes
Roll Call	No
Entry Tone	Yes
End Time Alert Tone	Yes - 5 Minutes
Exit Tone	Yes
Meet Me Per Conf	
Limited Occurrences	greyed out
Number of Occurrences	1
Recording	
Enable Recording	No
Recording Link Name	Empty
Start Recording	Immediately (greyed out)

Default Conference Template Properties - Software CP

Parameter	Value
General	
Name	SW CP
Remarks	(empty)
Duration	2:00 Hours
Billing	(empty)
Meet Me Per Conf.	Yes
Entry Queue Access	No
Conference Entry Password	(empty - to be allocated by system)
Web/Chairperson Password	(empty - to be allocated by system)
Start on MCU	Auto
Numeric ID	(empty)
Conference User Defined 1-3	(empty)
Conf. Type	Standard
Media	Audio, Video
Networks	IP, ISDN, ATM, MPI
Video Session	Continuous Presence - Software
Participants	None Defined
Basic	
Restricted	No
Line Rate	384 Kbps
Video Rate In/Out	(disabled)
Conference on Port	Yes

Parameter	Value
Same Layout	Yes (greyed out)
Lecture Mode	None
Lecturer Name	Auto select (greyed out)
Timer	(disabled)
Interval	10 sec. (greyed out)
FECC/LSD Rate	None
T120 Rate	None
Audio Alg.	Auto
VTX1000	No (greyed out)
SilenceIT	Yes (greyed out)
Pro-Motion	None (greyed out)
Dual Stream Mode	None (greyed out)
Video Protocol	H.264 (greyed out)
Video Format	CIF (greyed out)
Frame Rate	30 pic/sec.
Quality	Auto
Annex P	No
Annex N	No
Annex F	No
Roll Call	No
Entry Tone	Yes
End Time Alert Tone	Yes - 5 minutes
Exit Tone	Yes

Parameter	Value
Advanced	
Auto Termination	Yes
Minutes Before First Join	25
Minutes After Last Quit	5
Dial-Out Manually	No
Allow undefined Participants	Yes
Min Number of Participants	3
Max Number of Participants	Auto
Cascade	None
Master	None
Chair Control	None
Label	None
Attended	None
Message Service Name	Empty
Start Conf. Requires Chairperson	(disabled)
Terminate After Chairperson Exits	(disabled)
Mute ‘Meet Me’ Parties	(disabled)
Lock	No
On Hold	(disabled)
Enable Invite	(disabled)
Talk Hold Time	1.5
Audio Mix Depth	3
Encryption	No

Parameter	Value
Meet Me Per Conf	
Limited Occurrences	(disabled)
Number of Occurrences	(disabled)
Video Layout	
Video Layout	2, 4 (depending on the number of connected participants)
Background	No
Layout Border	No
Speaker Notation	No
Recording	
Enable Recording	No
Recording Link Name	Empty
Start Recording	Immediately (greyed out)

Default Conference Template Properties - Video-Switch

Parameter	Value
General	
Name	Video-Switch
Remarks	(empty)
Duration	2:00 Hours
Billing	(empty)
Meet Me Per Conf.	Yes
Entry Queue Access	No
Conference Entry Password	(empty - to be allocated by system)
Web/Chairperson Password	(empty - to be allocated by system)
Start on MCU	Auto
Numeric ID	(empty)
Conference User Defined 1-3	(empty)
Conf. Type	Standard
Media	Audio, Video
Networks	IP, ISDN, ATM, MPI
Video Session	Video Switching
Participants	None Defined
Basic	
Restricted	No
Line Rate	384 Kbps
Video Rate In/Out	(disabled)
Conference on Port	Yes

Parameter	Value
Same Layout	Yes (greyed out)
Lecture Mode	None
Lecturer Name	Auto select (greyed out)
Timer	(disabled)
Interval	10 sec. (greyed out)
FECC/LSD Rate	None
T120 Rate	None
Audio Alg.	56 (G.722/G.711)
VTX1000	Yes
SilenceIT	Yes (greyed out)
Pro-Motion	None
Dual Stream Mode	None
Video Protocol	Auto
Video Format	Auto
Frame Rate	disabled
Quality	Auto
Annex P	No
Annex N	No
Annex F	No
Roll Call	No
Entry Tone	Yes
End Time Alert Tone	Yes - 5 minutes
Exit Tone	Yes

Parameter	Value
Advanced	
Auto Termination	Yes
Minutes Before First Join	25
Minutes After Last Quit	5
Dial-Out Manually	No
Allow undefined Participants	Yes
Min Number of Participants	3
Max Number of Participants	Auto
Cascade	None
Master	None
Chair Control	None
Label	None
Attended	None
Message Service Name	Empty
Start Conf. Requires Chairperson	(disabled)
Terminate After Chairperson Exits	(disabled)
Mute ‘Meet Me’ Parties	(disabled)
Lock	No
On Hold	(disabled)
Enable Invite	(disabled)
Talk Hold Time	1.5
Audio Mix Depth	3
Encryption	No

Parameter	Value
Meet Me Per Conf	
Limited Occurrences	(disabled)
Number of Occurrences	(disabled)
Video Layout	
Video Layout	1x1 (full screen)
Background	(enabled)
Layout Border	Yes
Speaker Notation	Yes
Recording	
Enable Recording	No
Recording Link Name	Empty
Start Recording	Immediately (greyed out)